

Allocation Request Form



Edwards Rotary Club Application for Funding

Date: _____

1. Name of Organization: _____

2. Address: _____

City/State/Zip: _____

E-mail address: _____

3. Contact name/title and phone: _____

4. Purpose or mission of organization or project: _____

5. Reason for fund request: _____

6. Amount requested: _____ When needed: _____

What is your total fundraising goal? _____

7. Have you requested Rotary funding in the past? _____ If yes, when: _____

8. If this is your first fund request, please explain past funding sources: _____

9. Are you applying for funds from other sources in connection with this request? _____

If yes please identify name(s) of sources: _____

10. Has your organization been determined by the IRS to be an IRC 501 C (3) Organization?
(Having a 501C (3) is not a requirement for receipt of a contribution)

_____ Yes _____ No

A. Are you applying for funding through the use of a "conduit" or "pass through" IRC 501C (3) organization: _____ If so, do you have a written agreement with such organization to "pass through" funds if awarded: _____

- B. Please indicate percentage of requested funds to:
1. Your total annual operating budget: _____ %
 2. Your budget project costs: _____ %
- C. Please indicate level of financial statement: Audit _____, Review _____, Compilation _____, internally generated _____
- D. Supplemental documentation (copies):
1. Supporting materials for request
 2. Financial statements for the recent year
 3. Annual report/mission statement
 4. List of current officers and trustees/directors.

11. Indicate how the Edwards Rotary Club will receive recognition from our support: _____

12. Other than money are there other ways our club might help your organization? i.e. – volunteering: _____

12. Additional Comments: _____

NOTES:

A. All grant requests will be subject to the review of a committee member which will ordinarily result in a visit and/or telephone conference with you to verify and seek additional information that may be required.

B. Please note that all grants awarded by the Rotary Allocations Committee in excess of \$1,500 require follow-up monitoring by a committee member and documentation as to the actual grant utilization and/or applications.

C. Address all correspondence to:

FUNDS COMMITTEE
 EDWARDS ROTARY CLUB
 PO BOX 2474
 EDWARDS, CO 81632
 Send it to the Attention of Fraser Horn
 E-mail: fraser@1standmaininvest.com

Internal Use:	Date received: _____	Funds Committee (initial): _____
Board Approved (president): _____		Notes: _____
Amount: _____		