

## CHARITABLE GIVING PROGRAM

NHTrust is committed to supporting its local community through our Charitable Giving Program, in which funds are set aside to provide support to worthwhile, nonprofit and civic organizations. Completed Requests are carefully evaluated and considered by our Charitable Giving Committee. A minimum of 2 months prior to the deadline is needed to evaluate and process incoming requests. The Charitable Giving Committee meets once a month.

#### **Guidelines for Donation and Grant Requests:**

With the growing need in our communities for charitable dollars, NHTrust has determined the following will be the areas in which our contributions will be targeted to create the largest impact with a limited budget:

- Programs that support youth education including financial literacy
- Health and social service programs affecting the youth and elderly in our local community assisting low to moderate income citizens
- Programs that will make a positive impact enhancing business and economic development

Under no circumstances does NHTrust contribute to political parties, candidates, or fundraising events, or any organization that discriminates on the basis of gender, identity, religion, race, age, ethnicity, marital status, or sexual orientation.

#### **Procedure for Submitting Request:**

Complete the attached Donation Request Form and the required documentation 2 months prior to the deadline is needed.

- Include copy of 501C(3) Non-Profit Status Form
- Include copy of Taxpayer Identification Number (W-9 Form)
- Include brief cover letter on organizational letterhead, providing all relevant information not included in the Donation Request Form, including Mission Statement
- Include Sponsorship levels and ad specification materials, if applicable A completed Request

#### Package can be submitted in writing to:

NHTrust Charitable Contributions Committee Attention: Debbie Irwin, VP Marketing Officer 89 N. Main Street Concord, NH 03301 Email: dirwin@nhtrust.com

Not FDIC Insured	Not Bank Guaranteed	May Lose Value
Not a Bank Deposit	Not Insured by Any Federal Government Agency	

# NHTrust FINANCIAL ADVISORS

### **DONATION REQUEST FORM**

Date of Request:		
Organization Name:		
Mailing:		
Address:		
Phone:	Email:	Contact:
Required Documentation	on: Taxpayer Identifica	tion Number (W-9 Form); Copy of 501C(3) Status Form
Is this organization a 501C	(3) nonprofit agency?	
Is this organization a memb	per of United Way?	
What is the organization's p	primary mission?	
Amount Requested:		Check made payable to:
Detailed description of how	funds will be used:	
How does this organization	or this event help low-to-n	noderate income groups?
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The funds will be use	ed to benefit the follo	wing: (check all that apply)
Affordable Housing: Iov	w/moderate income	Health Care
Child Care Economic Developmer	nt 🗌	Revitalization of a low/moderate income area
Elderly Services		Veteran Programs/Assistance
Financial Education		Food Insecurity Other
Are you a customer o	of any of these banks	
MVSB Merrimac	k County Savings Bank	Savings Bank of Walpole None
What area(s) will the	funds benefit? (City,	State)
Signature of Person	making request:	
NHTrust   6	03.223.2712   89 North	Main Street, Concord, NH 03301   NHTrust.com

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