

# PRIVATE WEALTH MANAGEMENT CHARITABLE TRUSTS

COMPLETE AND RETURN THREE COPIES OF THIS APPLICATION ALONG WITH OTHER COMPONENTS LISTED BELOW, VIA US MAIL TO THE ADDRESS LISTED BELOW:

**SUBMISSION DEADLINE:** September 1 (postmarked)

**MAIL TO:** Citizens Bank Private Wealth Management Charitable Unit, Attn: NE1580, 900 Elm St., Manchester, NH 03101

**1. In triplicate; please provide 3 SEPARATE copies with the following information:**

- a. Grant summary-briefly summarize in a page or less, the intent and results you hope to achieve with this grant
- b. In 2-3 pages share the history of your organization, scope, goals, impact, budget request, and sustainability plan
- c. Tax exempt status letter
- d. Copy of any additional material regarding budgets, etc., which you feel will be helpful to the trustees in making their decisions
- e. A list of the Board of Directors
- f. Please DO NOT submit any documents or information in binders

**CHOOSE FROM ONE OR ALL TRUSTS YOU ARE APPLYING FOR:**

(Please note that funds are not guaranteed from all trusts selected.)

- Ann De Nicola Trust
- Arthur Getz Trust
- Waldo and Alice Ayer
- Mary Louise Billings Trust
- Parker Nelson Foundation

TOTAL AMOUNT REQUESTED: \_\_\_\_\_

**ORGANIZATIONAL INFORMATION:**

NAME OF ORGANIZATION: \_\_\_\_\_

PURPOSE OF ORGANIZATION: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CONTACT PERSON (include phone & email): \_\_\_\_\_

PURPOSE OF REQUEST: \_\_\_\_\_

**CHOOSE ONE:**  Capital     Equipment / Materials     Startup / Seed Dollars

**Geographic Area to be served** (i.e. Southern NH) \_\_\_\_\_

**FINANCIAL INFORMATION:**

ANNUAL ORGANIZATIONAL BUDGET: \_\_\_\_\_

PRINCIPAL REVENUE SOURCES (i.e. contributions, fees, contracts, other): \_\_\_\_\_

ENDOWMENT MARKET VALUE: \_\_\_\_\_

PRIOR GRANTS FOR THIS PROJECT OR IN SUPPORT OF YOUR ORGANIZATION FROM THE FOUNDATIONS LISTED ABOVE FOR THE LAST FIVE YEARS: \_\_\_\_\_

FUNDS RECEIVED OR PLEDGED FROM OTHER SOURCES: \_\_\_\_\_