



Charitable Donation Request Form

For all donation requests, please attach your request letter to this form and submit to: North Brookfield Savings Bank, Attn: Marketing, 35 Summer Street, North Brookfield, MA 01535

Organization Information

Organization Name: _____ Date: _____
Organization's Contact Person: _____ Title: _____
Mailing Address: _____ City: _____ State: _____ ZIP: _____
Phone Number: _____ Email Address: _____
Contact Person's relationship to the organization: Employee: Volunteer: Paid Worker: Fund Raiser:
What services are rendered by your organization? _____

Does the organization have an account with NBSB? YES: NO: If yes, under what name? _____

Donation Information:

Type of Contribution Requested: Monetary (include amount): _____
 In-Kind Donation / Promotional Item (include details): _____
 Sponsorship, Print Ads, Programs (include details / ad specs): _____
How will this donation be used? _____
What percentage of the donation will be used to help low to moderate income individuals or families? _____
When is the contribution needed by? _____
Complete forms and request letters must be submitted a minimum of 30 days before the contribution is needed in order to be properly considered
Check made payable to: _____
Mailing address for check: _____

FOR NBSB USE ONLY

Approved Denied

Is the organization CRA eligible? YES NO
(Community Reinvestment Act)

NBSB Signature of Approval Date



Community Giving Guidelines

Philosophy/Mission

Since 1854, North Brookfield Savings Bank (NBSB) has grown within the communities it serves and has been committed to improving those communities. North Brookfield Savings Bank recognizes a responsibility consistent with its business objectives to respond to the needs of the communities.

The Bank's goal is to support organizations or events that achieve a meaningful, positive and **broad** impact within its market area. The Bank is committed to:

- Reinvesting in the communities it serves.
- Being a model of service to those communities by participating in the organizations that fulfill the Bank's mission.
- Fully supporting employees and encouraging them to volunteer and be involved in the communities in which they live and work.

Geographic Target

North Brookfield Savings Bank will direct funding priority first to organizations located in and around, and supporting the communities served by our banking offices.

Funding Priorities

North Brookfield Savings Bank will provide funding priority to organizations and activities that achieve its established criteria and are within the geographic target area. Preference is also given to those organizations that serve many in the community over those that serve only select groups within the community.

Generally, financial resources will be focused on the following categories:

- Educational Programs – Programs that promote education for children and adults; particularly those with a primary focus on financial literacy
- Low-to-Moderate Level Income Households – Programs for at-risk or low-to-moderate income youth, families, and seniors (including food pantries, youth centers, and senior centers)
- Low-to-Moderate Income Affordable Housing – Initiatives that support affordable housing for low-to-moderate income individuals
- Economic Development and Job Development – Programs that support economic development, job establishment and revitalization of the business community
- Civic, Cultural and Social Initiatives – Initiatives that support improving the quality of life for local citizens and the communities we serve.

Limitations and Restrictions

North Brookfield Savings Bank does not provide support to: individuals, individual scholarships or travel support, religious or ethnic organizations (unless their services or resources are available equally to all other groups), organizations and institutions outside of (or which do not provide service or benefit to) the Bank's geographic area, beauty/scholarship pageants, political organizations or political candidates, organizations of a controversial nature, fundraising activities relating to individual sponsorship or third party fundraising organizations, or organizations seeking support to cover past operating deficits, travel, conferences, advertising, or undefined operations support.

Types of Contributions

North Brookfield Savings Bank provides support in various ways:

- **Monetary Donations** are made to non-profit and not-for-profit organizations. North Brookfield Savings Bank does not receive any tangible benefit (e.g. advertising, entertainment, booth display, etc.) for the contribution.
- **Sponsorships** help organizations raise money and may include advertising in event programs, banners or booth displays at events, ticket purchases for fundraising events, etc.
- **Community Service and Volunteering** is an important part of showing our support to the communities we serve. North Brookfield Savings Bank employees will frequently volunteer at local events.
- **In-Kind Donations** are item donations such as baskets, gift cards, office equipment, coin sets, etc. and are typically donated to an organization seeking an item for a fundraiser auction.

Donation Request & Required Documentation

Requests must include the following information:

- Official letter request on letterhead of organization
- NBSB Donation Request Form with the following information:
 - Purpose and background information of organization
 - Persons benefited by organization (number, age, range, etc.)
 - Time frame in which contribution is needed
 - Preferred contribution amount
 - Planned use of contribution
- W-9 form
- 501(c)(3) non-profit status exemption letter

All requests for donations must be delivered to a local branch or submitted in writing to:

North Brookfield Savings Bank
Attn: Marketing
35 Summer Street
North Brookfield, MA 01535