



CHARITABLE CONTRIBUTIONS POLICY

Bank of American Fork is committed to supporting causes that improve the quality of life for the residents of Utah. This support is most often given in the form financial donations to local organizations within the communities we serve.

All parties requesting financial support from the Bank must complete a charitable contribution request form. If the organization meets the requirements below, please complete the following form and submit it, along with a copy of your IRS tax letter and 501 (c)(3) to your local Bank of American Fork branch, online at bankaf.com or mail to address below.

Contributions Policy

- In Utah, a charitable organization is required to be registered with the Utah Division of Consumer Protection before soliciting charitable contributions.
- The organization must be a 501(c)(3) or non-profit organization.
- Requests should be submitted at least 60 days prior to the event to give proper time to evaluate the request.
- Complete proposals will be considered monthly by the charitable contributions committee.
- Incomplete proposals or those with deadlines within 60 days of submission may not be considered.
- Complete proposals include a description of the organization, its mission and major accomplishments, and a list of current board members and key staff.
- Within 60 days following the event, please provide a letter or program showing how funds were used and the benefits the Bank received.

Preferential consideration is generally given to requests where the following apply:

- The recipient is a local community organization in the state of Utah.
- Money donated will be spent in Utah.
- Money donated will directly benefit the residents of Utah.
- Money donated will benefit a significant group of people (as opposed to a single person).
- The Bank receives recognition for its donations.
- The requesting party or its significant members are clients of the Bank.

The Bank does not make charitable donations to for-profit organizations. For-profit organizations seeking sponsorship may submit requests which will be evaluated by the Bank on a commercial basis for the advertising and marketing benefit such sponsorships would provide to the Bank.

In order to accommodate contribution requests, the Bank may choose to donate promotional items that could be used by the requesting party.

Within 60 days following the event, please provide a letter or program showing how funds were used and the benefits the Bank received.

Please send complete proposals to the following address:

Bank of American Fork
Attn: Charitable Contributions
33 East Main Street
American Fork, UT 84003

Fax: (801) 763-6664

Please direct questions regarding Bank of American Fork's charitable contribution policy to Melanie VanDerHoeven at (801) 642-3042 or Melanie.Vanderhoeven@bankaf.com



CHARITABLE CONTRIBUTION REQUEST FORM

All of the following information is required in order for Bank of American Fork to consider your request.

Name of Soliciting Organization: _____ Date: _____

Solicitor's Name: _____

Street Address: _____ City: _____ State: _____ ZIP: _____

Phone Number: _____ Contact Email Address: _____

In Utah, a charitable organization is required to be registered with the Utah Division of Consumer Protection before soliciting charitable contributions.

Please make sure your proposal includes the following information:

- A description of your organization, including its mission and major accomplishments
- A list of current board members and key staff
- A copy of the letter from the IRS stating your organization's 501(c)(3) status

What is your title or relationship to the organization for which you are soliciting? _____

What services are rendered by your organization? _____

Purpose of Support _____

How will the funds raised be used? _____

What kind of advertising/signage and recognition will the Bank receive? _____

How many will be attending your event? _____ Date of event _____ Area/Community _____

Is your organization eligible for CRA (Community Reinvestment Act) credit? _____

What percentage of the donation will be used to help low to moderate income individuals or families? _____

Are there any other financial institutions donating at this time? If so, please list. _____

What type of contribution are you seeking from the Bank? (check one)

Monetary (Amount: \$ _____)

Bank AF Promotional Items

Desired Items: _____

By what date do you need the contribution? _____

Please submit complete proposals no less than 60 days before contribution is needed. Incomplete or late proposals may not be considered.

Does your organization or its governing members do business with Bank of American Fork? _____

Name(s) on account(s): _____ Account opening date: _____

To whom should the check be made payable? _____

Signature of Solicitor: _____

By signing this form, I verify that I am an authorized agent of the requesting nonprofit and this organization qualifies for "501(c)(3)" tax-deductible contributions as defined by the Internal Revenue Service.

Internal Use Only

Date Received: _____ Notes: _____ Status: _____

Date of Review: _____ Approved: _____ Denied: _____

