

**The Putnam Bank Foundation**  
**40 Main Street**  
**Putnam, Connecticut 06260**

Thank you for your interest in The Putnam Bank Foundation. This document will provide you with the instructions and application form necessary for your non-profit organization to submit a grant request.

Putnam Bank established the Foundation as a charitable extension of its commitment to the communities the bank and its employees have served since 1862. We feel that, as bankers, we have a responsibility not only to provide products and services, but also to enhance the quality of life in the communities where we and our customers live and work. The Putnam Bank Foundation is one means we have of giving something back to our communities.

The Foundation supports cultural, educational, health, housing, social services, and other charitable organizations that seek to improve the quality of life in the communities served by Putnam Bank. Charitable contributions to these organizations are intended to strengthen the relationship between Putnam Bank and the communities it serves. Generally, the Foundation will focus on project support rather than funding for bricks and mortar or general operating expenses. To apply, please complete the attached application and return it, accompanied by the documentation outlined below, to the address indicated.

We at The Putnam Bank Foundation are proud to have the opportunity to invest in organizations that make our communities better places to work and live. Please accept our best wishes for success in your charitable endeavors.

Very truly yours,



Thomas A. Borner  
President  
The Putnam Bank Foundation

## **Grant Review and Award Schedule**

The Putnam Bank Foundation reviews grant requests on the semi-annual schedule that appears below. One copy of the completed grant request form with an original signature and all supporting documents must be received by 5:00 p.m. on the deadline date in order to be considered. When the deadline falls on a Saturday or Sunday, the deadline will be extended to 5:00pm on the following Monday. Requests received after the deadline will be deferred to the next review cycle. Any awards will be documented in writing; please don't anticipate an award based on oral communication, past qualification or any other reason than a written award notification.

Completed applications received by:

March 31  
September 30

Will be reviewed during:

June  
December

## **Application Checklist**

In order for your grant request to be considered, the following supporting information and documents must be attached to your grant application:

- A copy of the IRS letter documenting the 501(c)(3) status of your organization
- The mission statement of your organization
- A list of your board of directors with their affiliations
- A complete budget for the project for which you are requesting funding
- The current annual operating budget for your organization
- Audited financial statements of the previous year's activities
- Your most recent annual report
- A copy of your current Form 990 report

If any of the above documents are unavailable or inapplicable, please note the reason on the Grant Application form.

## The Putnam Bank Foundation Grant Application

Please complete the following information  
and return it with the requested supporting documents to:

The Putnam Bank Foundation  
c/o Putnam Bank  
P.O. Box 151  
Putnam, CT 06260

### General Information

Name of Organization: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

Street Address: \_\_\_\_\_

(If different than mailing address)

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone ( ) \_\_\_\_\_ When was you organization started? \_\_\_\_\_

Fax ( ) \_\_\_\_\_

Please provide a brief description of the purpose, size, history, and mission of your organization. (Attach additional pages, if necessary):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Grant Request**

Amount requested: \_\_\_\_\_. Total project budget (please attach detail): \_\_\_\_\_

Please provide a brief description of the project for which you are requesting funds (attach additional pages, if necessary):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Proposed starting date of project: \_\_\_\_\_ Proposed completion date: \_\_\_\_\_

**Other Sources of Funding**

Please provide information about other public or private organizations that have provided significant charitable contributions to your organization during the past year.

Name of Contributing Organization	Amount of Contribution
_____	_____
_____	_____
_____	_____
_____	_____

**Approval of Chief Executive Officer**

The organization named above will act as the responsible fiscal agent for any funds which might be received and will comply with applicable tax laws, regulations, and The Putnam Bank Foundation’s policies as they may change from time to time. We understand that The Putnam Bank Foundation requires periodic program and financial expenditure reports from grant recipients and may request the opportunity to visit your programs for the purpose of project evaluation. You agree to cooperate in any project evaluations that may take place.

\_\_\_\_\_  
Signature of the Chief Executive Officer

\_\_\_\_\_  
Title

\_\_\_\_\_  
Name of Chief Executive Officer

\_\_\_\_\_  
Date