



THE BULFINCH GROUP  
*Charitable Foundation*

## The Bulfinch Group Charitable Foundation Giving Guidelines

### How to Apply for Funding:

Associates of the firm may apply for funding for a nonprofit 501( c ) (3) organization. The nonprofit's mission must fit into The Bulfinch Group Charitable Foundation's Mission:

*The Bulfinch Group Charitable Foundation's mission is to improve the lives of those in the communities we serve. The Foundation raises and distributes funds to non-profit organizations which the Board of the Foundation has determined align with our mission.*

*These organizations include health and human services, educational and cultural non-profits in Greater Boston communities, as well as in The Bulfinch Group services areas throughout New England.*

### General Giving Guidelines:

- The organization must be within the communities served by The Bulfinch Group (primarily Massachusetts with exceptions noted for New England communities where The Bulfinch Group maintains a presence such as Providence, towns in New Hampshire, etc.);
- Religious organizations are excluded from funding;
- International organizations are excluded from funding;
- Political organizations are excluded from funding; and
- The Foundation cannot fund sponsorships which are for marketing purposes and gifts cannot be associated with marketing or advertising efforts.

### Process for Selecting Charitable Recipients:

The Board of Directors of The Bulfinch Group Charitable Foundation, with monthly communication, review requests and grant allocations based upon the board's discretion and the non-profit's ability to fit into the guidelines established herein. At least five (5) Board of Director members must approve.

The Bulfinch Group associate responsible for the request will be notified in a timely fashion of the Board's decision on funding.

### Restrictions on Funding:

Please note that approved gift requests must be presented to the recipient organization as a gift, *and not a sponsorship. The Bulfinch Group cannot be listed in the program book* as the gift is being made to the organization from The Bulfinch Group Charitable Foundation, and cannot be associated with any marketing of The Bulfinch Group. In order to be as fair as possible with our distributions we will strive to limit the number of gifts granted to one per FR each calendar year, with the exception that if at year end additional funds are available.



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## The Bulfinch Group Charitable Foundation Application for Funding

Today's Date: \_\_\_\_\_

Name of Individual Requesting Funding: \_\_\_\_\_

Email of Individual Requesting Funding: \_\_\_\_\_

Name of Nonprofit: \_\_\_\_\_

501(c) (3) ID of Nonprofit: \_\_\_\_\_

Description of Non-profit (can be attachment) and website:

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Amount of Request: \$ \_\_\_\_\_

Description of Request and how Request Aligns with The Bulfinch Group Charitable Foundation's Mission:

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How important is this Organization to you and why? How long have you been affiliated with this Organization?

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