

# CHARITABLE DONATION REQUEST FORM

All of the following information is required in order for the Gallatin REALTORS® Charitable Foundation to consider your request.



Organization: \_\_\_\_\_ 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? \_\_\_\_\_

Dollar amount requested: \_\_\_\_\_ Is your organization looking for volunteers, in addition to funding? Yes  No

If funding is not possible, is your organization looking for volunteers?: Yes  No

How will this funding be used?

What specific impacts does your organization expect to achieve with this funding? \_\_\_\_\_

What kind of advertising/signage and recognition will the Gallatin REALTORS® Charitable Foundation receive, if any? \_\_\_\_\_

By what date do you need the contribution? \_\_\_\_\_

*Applications for funding requests for the calendar year will be reviewed and approved or denied at the January meeting of the Board of Directors.*

What are your primary funding sources? \_\_\_\_\_

To whom should the check be made payable? \_\_\_\_\_

Signature of Organization's Officer: \_\_\_\_\_  
*Within 30 days following the event, please provide a letter or program showing how funds were used*

**Please submit the following documentation with your completed application:**

- A description of your organization, including its mission and major accomplishments
- A copy of the letter from the IRS stating your organization's 501(c)(3) status
- A list of key staff and titles and current Board of Directors including officer status, if applicable

Send completed Applications To:  
Gallatin REALTORS® Charitable Foundation  
2880 Technology Blvd. West Ste. 159  
Bozeman, MT 29718

**Internal Use Only**

Date of Review: \_\_\_\_\_ Approved: \_\_\_\_\_ Denied: \_\_\_\_\_

Conditions:

# CHARITABLE DONATIONS POLICY

The Gallatin REALTORS® Charitable Foundation (Foundation), based in Bozeman, Montana, has been dedicated to providing assistance to community members in the Gallatin Valley and surrounding areas. To strengthen and enhance the community, the Foundation supports charitable giving, sponsorships, and volunteer efforts to REALTORS®, affiliates, and 501c3's in the region.

All 501(c)(3) organizations requesting financial support from the Gallatin REALTORS® Charitable Foundation must complete a Charitable Donation Request form. The completed form should fully explain the nature of the contribution being sought and include all requested documentation. The Charitable Donation Request form is available at the Foundation office or on the Foundation website; all required documentation should be submitted to the Foundation following the directions provided below.

## Contributions Policy

- The organization must also be a 501(c)(3) or non-profit organization.
- Requests should be submitted within the submission window of September 15th - December 15th.
- Complete proposals include a description of the organization, its mission, and a list of current board members and key staff.
- Nonprofit organizations should submit their tax-exempt letters from the Internal Revenue Service with their contribution requests.
- Complete proposals will be considered at the January meeting of the Foundation Board of Directors.
- Incomplete proposals or those not submitted within the annual submission window may not be considered.

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

- The recipient is a local community organization in the Gallatin Valley or surrounding area.
- Money donated will be spent in the Gallatin Valley or surrounding area.
- Money donated will directly benefit the residents of the Gallatin Valley or surrounding area.
- Money donated will benefit a significant group of people (as opposed to a single person).
- The Foundation receives recognition for its donations.

The Foundation does not make charitable donations to for-profit organizations.

## Completed Charitable Donation Request applications and supporting documentation may be submitted by mail or email:

Gallatin REALTORS® Charitable Foundation  
2880 Technology Blvd. West Ste. 159  
Bozeman, MT 59715  
[foundation@gallatinrealtors.com](mailto:foundation@gallatinrealtors.com)

Please direct questions regarding the Gallatin REALTORS® Charitable Foundation Charitable Donation Policy to Desirae Lindquist at (406) 585-0033 or email [foundation@gallatinrealtors.com](mailto:foundation@gallatinrealtors.com)



[www.gallatinrealtorsfoundation.com](http://www.gallatinrealtorsfoundation.com)