



## United Financial Credit Union Donation Request Policy

United Financial Credit Union has supported many organizations, groups, and events over the years. We are committed to supporting and strengthening our community, making it a better place to visit, work, and live. Our contributions include the volunteering of our employees as well as sponsorships, monetary and item donations.

While United Financial Credit Union would like to be able to fill each request for support, it is not feasible to do so. We must limit the scope of our support to levels that are responsible and in the best interest of our membership. These guidelines will not cover every possibility, special need or opportunity, and United Financial may make exceptions while considering the purpose for making donations.

### Donation Guidelines:

In order to be eligible, **your request must meet the following criteria**:

- Requests must be in writing and submitted to United Financial using the Donation Request form.
- Your application must be received at least 60 days prior to your event.
- Organizations, projects, programs, or events that focus on youth or education.
- Requests from United Financial Credit Union members and/or Business Partners may take priority over non-members.
- Only one request per organization will be considered during any 12 month period.

Unfortunately, **we do not fund the following**:

- School field trips, tours, clubs or sporting activity fundraising
- Individual fundraising efforts
- Activities, groups or events not in a United Financial branch community
- Administrative expenses or expenses such as conference and travel
- Projects whose primary purpose is legislative or political

All sponsorship requests must be submitted using the form below. All requests will be reviewed at the end of each month and you will be contact if selected. Due to the extremely high volume of requests, no phone calls or branch visits please.

# Charitable Contribution, Gift and Donation Request Form

All requests will be evaluated based on the information provided. Incomplete forms will not be considered. Please fill out the following information and return with any supporting documents.

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

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

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Name of Event: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Event Location: \_\_\_\_\_

Website or Facebook page: \_\_\_\_\_

Have you received the support of United Financial in the past?  Yes  No If yes, which year?: \_\_\_\_\_

Support Desired:  Monetary  Donation of Item Date needed: \_\_\_\_\_

The mission of the organization. \_\_\_\_\_

Amount Requesting: \_\_\_\_\_ Expected attendance at your event? \_\_\_\_\_

What is the purpose of this event? \_\_\_\_\_

Description of how these funds will be used to benefit the community. \_\_\_\_\_

Who is served or helped by the project, event or cause: \_\_\_\_\_

Is your organization a 501c3?  Yes  No

Support Desired (Donation Item Or Monetary Support)  Donation of Item  Monetary Support

If you are requesting Merchandise or giveaways, how will these items be distributed at your event? \_\_\_\_\_

How will the request fund be used to benefit the community? \_\_\_\_\_

List any marketing opportunities for United Financial (logo on event materials, advertisement, presentation, ect):

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What types of traditional media coverage, social media coverage, or on-site visibility will United Financial Credit Union receives as sponsor/donor? \_\_\_\_\_

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Please indicate other methods United Financial can assist your organization:

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If approved, we should make check payable to: \_\_\_\_\_

Mail check to \_\_\_\_\_

Could the organization benefit from volunteers from credit union personnel

Yes  No

Can the credit union set up a table/booth at event?

Yes  No

Can the credit union have a mobile ATM present at event?  Yes  No

Are you or a member of your organization a member of United Financial Credit Union\*?  Yes  No

If yes, please state name (s): \_\_\_\_\_

*\*Membership is not required for consideration.*

Closest office to your organization/event (please circle one):

Bridgeport Auburn Chesaning Freeland Saginaw Bay City

Request forms and supporting documents may be mailed, e-mailed, faxed to:

United Financial Credit Union

Attn: Donation/ Marketing Request

PO Box 6430 Saginaw, MI 48608

E-mail: [marketing@unitedfinancialcu.com](mailto:marketing@unitedfinancialcu.com) Fax: 989-777-3642

Recommending Employee: \_\_\_\_\_ Date Received: \_\_\_\_\_

Approve/Denied: \_\_\_\_\_ Initials: \_\_\_\_\_ Date: \_\_\_\_\_