THE JAQUES FOUNDATION POLICY STATEMENTS

FOR GRANT REQUESTORS

**Eligibility**

Grants from the Jaques Foundation will be made annually to qualifying organizations for the aid and assistance of dependent, aged men and women in Macon-Bibb County, Georgia. Organizations requesting grants from the Jaques Foundation must have currently valid letters of qualification from the Internal Revenue Service evidencing that they are qualified.

**Application Process and Required Information**

The application form should be executed accurately and fully with all requested documents attached. If, upon receiving a grant request, the Trustee desires further information, that information will be solicited from the organization making the request.

Please furnish an original and two copies of the following:

* Completed and signed grant application
* Proposed project or program budget
* IRS 501(c)(3) determination letter
* Most recent audited financial statement, including balance sheet and income statement
* Supplemental information (optional)

**Time Considerations**

Proposals for grants should be submitted **no later than May 1** each year. Any application received after May 1 will not be considered. Application packets may be emailed or mailed to the address listed below.

If you are selected as a grant recipient, the name of your organization will be printed in the local newspaper. If you do not wish for your charity’s name to be published, please check this box. **🗆**

**Grant Policies**

1. **General**
   1. The policies stated below govern the making of grants by the Trust. Discretionary policies described below will be varied only in rare circumstances. Variance from a discretionary policy because of a specific circumstance is not to be considered as setting a precedent for future grants. The Trustee reserves the right to revise any policy, whether mandatory or discretionary, from time to time, as circumstances warrant.
2. **Mandatory Policies**
   1. Grants will be made only to organizations which are qualified under Section 501(c)(3) of the Internal Revenue Code to receive charitable contributions and which are organizations to which charitable contributions may be made under the provision of Section 170(c) of the Internal Revenue Code as such sections are modified by Sections 2055(a) and 2522 (a) of the Internal Revenue Code.
   2. Grants will be made only to organizations described in Paragraph (a) above which furnish documentation satisfactory to Trustee that they are so qualified.
   3. Grants will not be made to private foundations.
   4. Recipients of grants will be required to make timely and adequate reports certifying how and when grant funds are expended.
   5. No subsequent grant will be made to a grantee who has failed to comply with the reporting requirements set out in Paragraph 2(d) above.
   6. At the trustee’s discretion, grants will be made only to those applicants who have completely executed an application on a form furnished by the Trustee and have supplied the required documentation. This policy, however, does not preclude the Trustee from initiating requests for proposals where the prospective grantee performs or may perform functions which are deemed particularly worthy of a grant.
3. **Administrative Policies**
   1. Applications may be received at any time by the Trustee, but applications received after May 1 will not be eligible for consideration.
   2. The Advisory Committee may require information in addition to that furnished by the application whenever in its judgment it determines that such additional information is needed to make a proper decision with respect to the application.
   3. In order to consider a grant application, the Trustee requires a complete application with adequate information to determine that the organization is qualified to receive a grant.
   4. The Trustee will provide the Advisory Committee annually with the dollar amount of mandatory payout when that figure has been determined.
   5. The Trustee will, prior to the meeting, prepare a synopsis of the grant requests for review by the Advisory Committee.
   6. The Advisory Committee will meet at least annually. The Trustee will attempt to arrange for the meetings at such time as is mutually agreeable to the members of the Committee to the extent possible.
   7. Grantees will be expected to report to the Committee as soon as funds have been expended stating the amount of the expenditure, the purpose for which expended, and the amounts of funds from other sources which were combined with the funds granted by the Committee for the accomplishment of the project.
   8. Reports should be in letter form with as much specificity as possible and emailed or mailed to:

The Jaques Foundation

Bank of America Private Bank

Attn: Maria Botelho, VP

1 Financial Plaza RI1-537-10-04

Providence, RI 02903

Email: maria.i.botelho@bofa.com and whitney.jarosz@bofa.com

THE JAQUES FOUNDATION

GRANT APPLICATION

# BANK OF AMERICA, N.A.

Attn: Maria Botelho, VP

1 Financial Plaza RI1-537-10-04

Providence, RI 02903

Email: maria.i.botelho@bofa.com and whitney.jarosz@bofa.com

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Legal Name of Organization Tax ID Number of Applicant Organization

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Address

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Name of Contact Person Telephone Number

5.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Amount of grant requested

6. Briefly state the purpose and use to which grant monies would be put.

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7. If grant is for a specific project, then

1. State the total cost of the project \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

b. State the source(s) and amount(s) of other financial support, if any \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8. State the number of people served by your organization and a general description of citizens served by your organization.

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9. State the geographic area served by your organization.

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10. List all parent, affiliate and subsidiary organizations.

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10. By the filing of this grant and by the acceptance of any grant made pursuant to it, requester warrants that:

1. The filing of this grant proposal has been duly authorized by the requesting organization, and the individual who signs it is authorized to do so.
2. Any funds granted to the requesting organization will be expended solely for the purpose or purposes set out in the grant proposal.

c. The documents attached hereto showing the tax exempt and/or foundation status of the

requester are currently in full force and effect, and have not been modified, altered, questioned, revoked, nor is there any contention by the Internal Revenue Service known to the requester that to the requester that any of them should be modified, altered, or revoked; and, that if any such action is taken or proposed, requester will forthwith notify the Trustee.

1. Since the respective dates of the documents described in the preceding subparagraph, the

requester has not changed its method of operating nor its form, organization, or purposes.

(If there has been such a change, attach a statement explaining it.)

1. If requester is now or should hereafter be determined to be a private foundation, funds granted

by the Foundation shall be expended so as to assure full compliance with the provision of the Internal Revenue Code for qualifying distributions; and in the event that the grant or any portion thereof is determined to be a non-qualifying distribution, requester will repay the same forthwith to the Jaques Foundation.

1. Any grants previously made by the Foundation to the requester have been fully expended in a timely manner for the purpose stated in the grant and for no other purpose.
2. Requester understands that when grants made pursuant to this proposal are expended, a report

must be made to the Foundation certifying that all terms of the grant have been fully met and stating the purpose(s) for which grant funds were expended.

This \_\_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 20\_\_\_\_\_.

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LEGAL NAME OF PROPOSING ORGANIZATION

BY:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SIGNATURE AND TITLE OF OFFICER SIGNING

FOR REQUESTING ORGANIZATON