



# SOUTH SHORE BANK

## Donation or Sponsorship Request Guidelines and Criteria

South Shore Bank is committed to serving the needs in the communities where we live and do business. As a local institution, we aren't just bankers. We're neighbors. You'll find us next to you at local events, volunteering for important causes and helping to grow our community.

Please review the following guidelines for giving. If your organization qualifies, please complete and submit the request form.

### General Guidelines:

The requesting organization or program should assist our local communities and benefit people living within the counties we serve.

- All donation requests should be made at least 30 days before funds are needed.
- All donation requests must be submitted on the Request Form, available at [www.southshorebank.com](http://www.southshorebank.com) or any branch location. Form to be completed in its entirety.

### Giving Opportunities:

- Monetary Donation or Sponsorship. See General Guidelines.
- In-Kind Donations of promotional items. See General Guidelines.
- Volunteers. In addition to supporting our local organizations financially, we believe that in order to make a community really shine, it takes people volunteering to help. If your organization needs a little help, let us know.

### Criteria:

It is South Shore Bank's practice to support non-profit groups as a whole rather than donations for individual requests, for profit businesses, government agencies, travel support, political organizations, campaign causes or candidates, or for lobbying or religious purposes.

While donations to individuals do not qualify, South Shore Bank may instead elect to contribute directly to the organization.

### How to Apply:

To apply for support from South Shore Bank, please complete the Donation or Sponsorship Request Form and submit in person to any branch, by email, or mail to:

South Shore Bank  
Attn: Nikki Corbo  
1010 Washington Street  
Braintree, MA 02184



## Donation or Sponsorship Request Form

### CONTACT INFORMATION

Organization / Event name			Date of application	
Federal Tax ID # <b>*Please provide a copy of your W-9 with this application.</b>			501(c) Organization? Yes      No	
Primary contact	Phone number	Email address		
Mailing address	City	State	Zip	
Street address	City	State	Zip	
Organization website	Facebook URL	Link to Mission Statement (if applicable)		

### REQUEST INFORMATION

Amount or item requested

Event date, time and location (if applicable)

Preferred SSB location to pick up items (if applicable)

Will the donation primarily benefit low to moderate income (LMI) individuals/families as defined by the Department of Housing and Urban Development? Yes      No  
If yes, attach supporting documentation which may include the following:

- Copy of mission statement
- Data showing percentage of LMI families served
- Signed letter from organization stating that LMI families are primary individuals served

### DOES THE PRIMARY PURPOSE OF THE DONATION/SPONSORSHIP MEET ONE OF THE FOLLOWING CRITERIA?

(Please check all areas that apply)

Community Service, include description below:

Affordable Housing

Promote Economic Development\*

\*supports permanent job creation, retention and/or improvement for persons who are currently low to moderate income.

#### Submit form to:

South Shore Bank  
Attn: Nikki Corbo  
1010 Washington Street  
Braintree, MA 02184

Please provide the following descriptions. Attach additional pages if needed.

**DESCRIPTION OF ORGANIZATION (MISSION OF THE ORGANIZATION AND WHO DO YOU SERVE)**

**DESCRIPTION OF HOW YOUR REQUEST WILL BE USED. (PURPOSE FOR USE OF FUNDS)**

**DESCRIPTION OF BENEFITS, RECOGNITION OR CONSIDERATIONS THE BANK WILL RECEIVE**

**DESCRIPTION OF YOUR BANKING RELATIONSHIP WITH SOUTH SHORE BANK**

**OTHER**

**ADDITIONAL REQUIREMENTS**

**Please include a copy of your W-9 with your application.** In addition, please attach a list of the organization's Board of Directors as well as an annual report if applicable. If there is any additional information that would help us make a better decision regarding your request, please attach it as well. Thank you.

**Thank you for your request.**

