

Community Investment Application (Checklist)

At Heritage Credit Union we provide different funding options depending on the support that organizations and/or projects request. We carefully examine the benefits provided to our communities resulting from your work. Our members expect no less.

*For promotional items and requests of up to \$500, we encourage you to submit a **Donation Request Letter** to your local branch manager or branch staff.*

For requests over \$500, we encourage you to apply for Heritage Credit Union Sustainable Community Investment Fund. In order to qualify, we expect organizations to have done their homework and considered a thoughtful recognition strategy.

Tell us about your Organization

Your Community	
Organization Name, address, date established	
Brief history, purpose and achievements of the requesting organization	
Society Act or charitable registration number or other basis for provision of tax receipts	

Organizations primary contact

Primary contact information (address, phone number, email)	
List of the Officers and Board of Directors of the organization	

About your Community Project

Type of project (How the funds are to be used)	
Needs of the Community addressed by the proposal (Community Goal)	

Project start date	
The amount requested	\$
When the funds are required	
Detailed budget including any grants or in-kind contributions from other public or private sources	
Detailed schedule of project implementation	

Heritage Credit Union Recognition

Detailed recognition plan that clearly describes how Heritage Credit Union will be acknowledged for its contribution	
How did you hear about Heritage Credit Union Sponsorship	

Disclaimers

- Yes, we certify that, to the best of our knowledge, the information provided in this application is accurate and complete and is endorsed by the organization which we represent.
- Yes, I consent to Heritage Credit Union collecting, using and disclosing my personal information as described in the privacy agreement.

(Signature Senior Officer, President, Chair)

(Date)