

# The Stephenson National Bank & Trust Charitable Contribution Guidelines

The Stephenson National Bank & Trust (SNBT) has been committed to continually enhancing our communities through corporate sponsorships and charitable donations.

## General Criteria

Any group or organization requesting a corporate sponsorship or charitable donation from SNBT, must meet **all**\* of the following criteria:

### Group/Organization must be:

1. Located in an area community in which The Stephenson National Bank & Trust serves;
2. Group must be non-profit, not for profit, or an organization that provides services to the community;
3. Submit a written request and provide supporting documentation.

\*Requests submitted that do not meet the above requirements will not be considered.

### The following are generally ineligible to receive contributions from The Stephenson National Bank & Trust

- Individuals raising funds for personal activities or that benefit only 1 person or family;
- Political organizations or candidates for public office;
- Requests that are sensitive, controversial, or harmful or that pose a potential conflict of interest to SNBT;
- Organizations that discriminate on the basis of race, religion, age, color, sex, disability, national origin, ancestry, marital status, sexual orientation, or veteran status;
- Contribution for events/activities that have already occurred;
- Organizations outside the United States

## Contribution requests

When you are ready to submit your request, please send us a completed SNBT Charitable Contribution Request Form, along with any additional information to:

**The Stephenson National Bank & Trust**  
**Attn: Contribution Coordinator**  
**P.O. Box 137**  
**Marinette, WI 54143**

you may also email your completed request form and information to [Kathleen.vincent@snbt.com](mailto:Kathleen.vincent@snbt.com). *Be sure to include all additional pertinent data. (Please allow 30 days lead time)*

*Please note that at this time, we are unable to accept requests over the telephone.*

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## Stephenson National Bank & Trust Charitable Contribution Policy Review Process

Each request is considered on its own merits, reviewed by the Contribution Coordinator for eligibility and then submitted to our committee as applicable.

What is the difference between a sponsorship and a donation?

- A "sponsorship" is a partnership negotiated with another organization (sometimes a not-for-profit organization) for marketing purposes. For example, our logo might be printed on your program or on the backs of your t-shirts. Please designate which type of contribution you are requesting.
- A "donation" is strictly defined as either funds or an item given to a not-for-profit organization, for which a tax receipt is issued.



Date Received: \_\_\_\_\_

Approval: \_\_\_\_\_

COMMENTS: \_\_\_\_\_

Branch Manager Approval (Marquette, Oconto, Green Bay) \_\_\_\_\_

**REQUIRED: CHARITABLE CONTRIBUTION REQUEST FORM**

1. Name of Organization \_\_\_\_\_  
(NO ACRONYMS PLEASE)

2. Name of Event \_\_\_\_\_ Event Date: \_\_\_\_\_

3. Organization's Address: \_\_\_\_\_ Phone: \_\_\_\_\_

4. City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

5. Contact Person: \_\_\_\_\_ Email (REQUIRED): \_\_\_\_\_

6. Is your organization incorporated as a non-profit? Yes\* No

\*If yes, what is your non-profit category? i.e. 501c3, \_\_\_\_\_ Please attach a copy.

7. Is your organization affiliated with the United Way? Yes No

8. What is your organization's primary purpose or mission? \_\_\_\_\_

9. Does your organization primarily benefit low to moderate-income individuals or areas? Yes\* No

a. If yes, in what way? \_\_\_\_\_

10. Supporters and/or Board Members \_\_\_\_\_

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11. Does your organization bank with SNBT? Yes No

12. Please list any SNBT employees involved with your organization: \_\_\_\_\_

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13. What type of donation are you requesting? \_\_\_\_\_ Monetary What amount? \_\_\_\_\_  
\_\_\_\_\_ Raffle

14. Is this for a promotional or advertising sponsorship? Yes No

15. Date needed by \_\_\_\_\_ **(Please allow 30 days lead time)**

16. Please include a description of how/what the contribution would be used for: *(attach additional information if available)*

PLEASE RETURN COMPLETED FORM TO: Contribution Requests, PO Box 137 Marinette, WI 54143

OR Email to: [Kathleen.vincent@snbt.com](mailto:Kathleen.vincent@snbt.com)

**FOR BANK REVIEW COMMITTEE USE – please do not write in this area**

Bank recognition for donation? Yes No Check requested (date) \_\_\_\_\_

Approved (as requested) Date: \_\_\_\_\_ Check #: \_\_\_\_\_ Date mailed: \_\_\_\_\_

Approved (as follows): \_\_\_\_\_ Date: \_\_\_\_\_

Denied (reason): \_\_\_\_\_ Date: \_\_\_\_\_