



## Charitable Requests Giving Guidelines 2021

Truliant Federal Credit Union's Charitable Program provides further investment in nonprofit organizations who are strengthening and improving local communities. Truliant has an internal committee of staff members who volunteer their time to review proposals that are submitted through this program.

### **Consideration is given to nonprofits that meet the following criteria:**

- Have a tax-exempt status under IRS section 501(c)(3)
- Have been in operation for at least three years
- Have a volunteer board overseeing the organization's operations
- Align with one of the focus areas (below)
- Provide services to individuals living in a community with a Truliant Member Financial Center

### ***Focus Areas***

**Community Development:** Cultivate relationships, enhance social responsibility and civic engagement, and build community. Examples include:

- Workforce development
- Community empowerment activities
- Support small business success

**Economic Mobility:** Provide personal guidance and activities to build financial stability and social prosperity for individuals and their families. Examples include:

- Food insecurity
- Affordable housing
- Access to transportation

**Financial Wellness:** Specific programs and activities that promote and improve financial inclusion and financial education. Examples include:

- First time homebuyer programs
- Financial counseling
- Efforts to help build or establish credit

**Youth & Education:** Support for education and programming from pre-K through high school. Examples include:

- Leadership opportunities for teens
- Student mentoring
- Soft skills development
- Efforts to support and retain teachers

### ***Funding Exclusions***

Truliant is unable to support the following types of requests:

- Capital campaigns or general operating expenses



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- Individuals or families, including those raising funds or pledges to support a single individual or a family unit
- Faith-based organizations or religious programs
- For-profit organizations or those without 501(c)(3) status
- Political candidates, parties, campaigns or causes
- Clubs, groups and organizations within a school (booster clubs, athletics, PTO/PTA organizations)
- Nonprofits operating outside of a TruLiant community
- Groups that discriminate based on race, color, religion, age, sex, sexual orientation, gender identity, marital status, national origin, disability, veteran status or other legally protected status

### ***Funding Process***

Any nonprofit organization interested in charitable funds must complete the application at [www.truliantfcu.org/community/charitable-contributions](http://www.truliantfcu.org/community/charitable-contributions). The charitable committee reviews requests every other month. Requests are accepted throughout the year. Meeting dates for 2021 are outlined here.

- February 8, 2021
- April 12, 2021
- June 14, 2021
- August 9, 2021
- October 18, 2021
- December 13, 2021

It can take up to three months for an application to be fully considered. TruLiant Federal Credit Union supports organizations most consistent with the focus areas outlined in this document. All organizations will be contacted regarding their application status.

For more information, contact [community@truliantfcu.org](mailto:community@truliantfcu.org).