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Member FDIC  Equal Housing Lender

# Charitable Request Form

## Charitable Request Form Instructions

Bar Harbor Bank & Trust invites nonprofit organizations to complete the Charitable Request Form for funding consideration. The Bank requires at least nine weeks to adequately consider each request, as well as the following list of materials to accompany each nonprofit submission:

- IRS Form W-9
- Cover Letter/Materials Identifying Organization Mission and Services Provided
- Sponsorship or Campaign Proposal (if applicable)

Please submit a completed Charitable Request Form and all supporting documentation by either emailing it to [communitygiving@barharbor.bank](mailto:communitygiving@barharbor.bank) or dropping it off at your local Bar Harbor Bank & Trust branch.

## Charitable Request Form Questionnaire

|                              |  |  |
|------------------------------|--|--|
| Request Date                 | _____  |  |
| Request Amount               | \$ _____   |  |
| Organization Name            | _____  |  |
| Organization Website         | _____  |  |
| Organization Mailing Address | _____  |  |
| Organization Contact Person  | _____  |  |
| Organization Contact Role    | _____  |  |
| Organization Contact Phone   | _____  |  |
| Organization Contact Email   | _____  |  |
| Organization Event Name      | _____  |  |
| Organization Event Date      | _____  |  |
| Donation Needed By Date      | _____  |  |
| Collateral Needed By Date    | _____  |  |
| Organization Request Focus   | <input type="checkbox"/> Healthcare/Human Services | <input type="checkbox"/> Education/Development |
|                              | <input type="checkbox"/> Animals                   | <input type="checkbox"/> Housing               |
|                              | <input type="checkbox"/> Environmental             | <input type="checkbox"/> Arts/Cultural         |
|                              | <input type="checkbox"/> Recreation/Wellness       | <input type="checkbox"/> Other (specify below) |
|                              | _____  |  |

Charitable Request Form continues on next page.

## Charitable Request Form Questionnaire Continued

Population Services Benefit  
(i.e., veterans and their families) \_\_\_\_\_

Geography Services Benefit  
(i.e., towns/cities/regions) \_\_\_\_\_

Does Organization Offer Services for Low and Moderate Income Individuals, Families, or Geographies?

- ☐ Yes, the **mission of the organization** is to serve this demographic.
- ☐ Yes, the **purpose of this program/event** is to serve this demographic.
- ☐ No, our **organization does not** serve this demographic.

If Question Above Answered as **Yes**:

What **Percentage** of People Served are Low and Moderate Income? \_\_\_\_\_ %

Describe **How** This Percentage has been Determined without Compromising Privacy of Those Served

\_\_\_\_\_

Name Any Bar Harbor Bank & Trust Employees Affiliated with Organization Board/Activities (if applicable)

\_\_\_\_\_

Please Describe Organization Relationship with Bar Harbor Bank & Trust (if applicable)

- ☐ Organization is a **Deposit** Customer.
- ☐ Organization is a **Loan** Customer.
- ☐ Organization is a **Financial Services** Customer.
- ☐ Organization is a **Wealth Management** Customer.
- ☐ Organization is a **Merchant/Treasury Services** Customer.

**Please ensure the Charitable Request Form has been completed in its entirety  
and is accompanied with all the listed materials upon submission.**

Bar Harbor Bank & Trust proudly supports the communities it serves throughout Northern New England.  
Learn more about Bar Harbor Bank & Trust's rich history of giving at [www.barharbor.bank](http://www.barharbor.bank).