



Charitable Contribution, Gift and Donation Request Guidelines

DuTrac Community Credit Union is dedicated to supporting the communities it serves as well as the credit union philosophy of "People Helping People." As part of these commitments, DuTrac supports charitable organizations that enhance the lives of our membership and the communities in which they work and live. To request a donation or sponsorship from DuTrac Community Credit Union, please review the board approved donation policy and eligibility guidelines below:

All requests must be submitted in writing, accompanied by a DuTrac Charitable Contribution, Gift and Donation Request Form found at dutracs.org/donation-requests. Request forms and supporting documentation may also be mailed or e-mailed to:

DuTrac Community Credit Union
Attn: Donation/Marketing Request
PO Box 3250
Dubuque, IA 52004-3250
E-Mail: donations@dutracs.org

A minimum of 30 days notice is required for consideration. All requests will be evaluated on an individual basis by a donations committee. DuTrac Community Credit Union reserves the right to deny any and all requests by any and all parties regardless of whether they meet or do not meet the criteria noted herein. DuTrac also reserves the right to provide in-kind contributions in lieu of cash requests for organizations that meet the criteria as set forth in this policy.

DuTrac's Donation Policy

Consideration will be given to the financial need of each request, based on the following:

- the requesting organization's sources of support;
- the donation's overall impact to the community or communities served;
- the donation's overall positive impact on DuTrac's members;
- the size or amount of the contribution request; and
- funds availability.

Eligibility Requirements

Donations must benefit non-profit organizations with tax exemption under Section 501(c)(3) or (6) of the Internal Revenue Code which are considered charitable, civic, educational, recreational and/or receive the majority of their support through outside funding. Requesting entities must conduct activities in a community, or within an adjacent community, in which DuTrac has a place of business.

DuTrac may NOT consider contributions to the following:

- sponsor(s) of or to political or partisan organizations;
- "for-profit" organizations;
- religious groups or religion-based organizations;
- individual teams or smaller sports organizations that do not benefit a large segment of the community;
- individuals (including members) or organizations seeking funds for personal or individual endeavors, including reimbursement for medical needs or expenses;
- those organizations where funds would be used for the purpose of building assets or capital;
- those capable of supporting themselves; or
- individual(s) or small group(s) that is not representative of the communities DuTrac serves or to the membership as a whole.



Charitable Contribution, Gift and Donation Request Form

All requests will be evaluated based on the information provided. Incomplete forms will not be considered.

Organization Name: _____

Mailing Address: _____

Contact Name: _____

Phone Number: _____ E-mail: _____

Name of Event: _____ Date of Event: _____

Location of Event: _____ Estimated Attendance: _____

Does your request fit DuTrac's donation guidelines?: Yes No

Request: _____

What is the purpose of this event?: _____

How will the in-kind donation or money raised be used?: _____

Date donation is needed: _____

List any marketing opportunities for DuTrac (logo on event materials, advertisement, presentation, etc.): _____

Please indicate other methods DuTrac can assist your organization: _____

Are you or a member of your organization a member of DuTrac Community Credit Union*?: Yes No

If yes, please state name(s): _____

**Membership is not required for consideration nor does membership influence DuTrac's decision.*

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