



300 S.W. Adams Street Peoria, IL 61634  
Phone 309.674.8255

## Charitable Donation Program Guidelines

Illinois Mutual believes corporate responsibility extends beyond employees, agents and policyowners. As included in our Company Mission Statement, Illinois Mutual's "commitment to the community is driven by our desire to support organizations that make a difference in the lives of those around us."

Through our Community Relations Charitable Donation Program and the volunteer efforts of our employees, we enthusiastically lend our support and services to assist in a variety of areas – civic, cultural, educational, environmental and human care. To facilitate this effort, we have established the following program guidelines to aid in our resource allocation.

### Eligible Organizations:

Illinois Mutual will make charitable contributions and/or in-kind donations to nonprofit, tax-exempt or charitable organizations and educational institutions/funds.

### Illinois Mutual Preferences:

Our Charitable Donation Program provides support to organizations that have been approved by the IRS as a 501(c)(3) charity, educational institutions/funds and public organizations where any donation requested will be used exclusively for public purposes. We target our support to specific programs or projects that enhance the scope of services offered by an organization and/or capital campaigns. Illinois Mutual will generally not support operating costs, specific individuals, travel by groups or individuals and organizations that discriminate on the basis of race, ethnicity, religion or gender.

### Geographic Focus:

Contributions are primarily limited to organizations located in communities where the Company operates and where its employees and their families live and work.

### Donation Criteria:

Illinois Mutual uses the following criteria when evaluating requests for charitable contributions:

- Is the recipient a charitable organization, an educational institution/fund, or a stable nonprofit 501(c)(3) organization with a diverse funding base?
- Does the program meet a community need that falls within our focus areas?
- Does the program yield measureable results for its participants?
- Does the program offer volunteer opportunities for Illinois Mutual employees?

### Requirements for Submitting a Proposal:

Requests for funding should be as brief and concise as possible and include the organizations mission, history, purpose, geographic scope, volunteer participation plus major accomplishments. In addition to completing the Charitable Donations Application Form on page 2 and 3 of this document, the following information should also be included in (or with) a proposal:

- Current operating budget and sources of income, applicable grants and other fundraising efforts for the organization.

- The amount of funds being requested from Illinois Mutual and, if applicable, a total project-specific budget.
- Plan of action and time frame for use of funds.
- How the requested funds will be used outlining the targeted individuals the funds will impact.
- How the project/organization's success will be determined or measured and how the results will be communicated.
- If applicable, specific ways Illinois Mutual will be recognized.
- If applicable, latest audited financial report or a financial statement for the organization.

### Proposals should be sent to:

Illinois Mutual  
Community Relations Department  
Charitable Donations Program Request  
Attn: Amy Epkins  
300 SW Adams  
Peoria, IL 61634

Applications are received year round and will be reviewed on a continuous basis. Submitting an application does not guarantee funding. Only the Community Relations Department and Company Chairman have the authority to authorize Company donations. Requests or proposals approved for funding in any one year are not guaranteed for future funding unless indicated so by Illinois Mutual, in writing, and due specifically to the nature of the request.

If renewed funding is desired and has not been previously agreed to by Illinois Mutual, the organization will need to submit a subsequent application.

### Restrictions:

Illinois Mutual does not fund:

- Nonprofit organizations that are not stable nonprofit 501(c)(3) organizations with a diverse funding base or a charitable organization.
- Non-accredited schools or schools beneath a post-secondary level.
- Politically partisan programs, organizations or campaigns.
- Religious programs.
- Organizations outside the U.S.

# Illinois Mutual Community Relations - Charitable Donations Application Form

\_\_\_\_\_  
Organization Name Contact Person

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City State Zip Code

\_\_\_\_\_  
Website Address

\_\_\_\_\_  
Phone Number Email Address

Preferred Method of Contact (*please circle one*): Phone Email

Organization's Board of Directors:

Name:	Position (if applicable):	Company (if applicable):
_____	_____	_____
_____	_____	_____
_____	_____	_____
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How often does the Board of Directors meet? \_\_\_\_\_

What is the typical size of your organization:

Number of Full Time Employees \_\_\_\_\_ Number of Part Time Employees \_\_\_\_\_

Number of Regularly Scheduled Volunteers \_\_\_\_\_

Has Illinois Mutual contributed to your organization in the past?                      Yes                      No

Are you willing to be included in Illinois Mutual publications as we reference the organizations and projects we contribute to?                      Yes                      No

Brief description of the reason for this application and proposal request (*Please be sure to attach a full proposal as outlined by program requirements*):

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Deadline or timeframe for which you are requesting funds: \_\_\_\_\_  
(*Examples: Funds requested by April 1; or Funds requested over a two-year period.*)

Enclosures should include:

- Completed Charitable Donation Program Application Form
- Explanation of the organization's mission, history, purpose, geographic scope, volunteer participation plus major accomplishments
- Audited Financial Report or Statement
- Full proposal to include:
  - Current operating budget and sources of income, applicable grants and other fundraising efforts for the organization.
  - The amount of funds being requested from Illinois Mutual and, if applicable, a total project-specific budget.
  - Plan of action and time frame for use of funds.
  - How the requested funds will be used outlining the targeted individuals the funds will impact.
  - How the project/organization's success will be determined or measured and how the results will be communicated.
  - If applicable, specific ways Illinois Mutual will be recognized.

All Applications and Proposals should be sent to:

Illinois Mutual  
Community Relations Department  
Charitable Donations Program Request  
Attn: Amy Ekins  
300 SW Adams  
Peoria, IL 61634

Person submitting this application and proposal:

\_\_\_\_\_  
Name (*please print*)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date