



Beauport Financial's  
Richard D. Wilson  
Community  
Response Gift Fund

BEAUPORT FINANCIAL SERVICES

Please take the time to read through the components and requirements of The Richard D. Wilson Community Response Gift Fund program before filling out the grant form and gathering requested materials. Call us with any questions. All the best in nominating a worthy, non-profit charitable group.

## PROGRAM OVERVIEW

### Our Mandate

*"To offer financial support for charitable non-profits to make an immediate and lasting impact by actively sharing our blessings with those in need in our community."*

### The Program + The Grants

Beauport Financial will give 10% of each year's company profits to a select number of charitable organizations in our community determined by grant requests submitted to us annually.

### Grant Eligibility






Eligible recipients are tax-exempt organizations that are nominated. Priority is given to charities in which Beauport Financial clients are personally involved. In addition, strong consideration will be given to those charities serving members of our community with the greatest needs.

## REQUIREMENTS & PROCEDURES FOR SUBMITTING A GRANT PROPOSAL

### Eligibility & General Information

**The Richard D. Wilson Community Response Gift Fund** makes grants only to non-profit tax-exempt charitable organizations that are exempt under Section 501(c) (3) of the Internal Revenue Code. In order to submit a grant request, you must be a client of Beauport Financial or have an approval to submit a grant on ones behalf.

The maximum request is \$5,000.00. The project or work for which funds are requested must exhibit:

-  A high probability for success
-  A qualified staff and responsible Board of Directors
-  A method for ensuring financial accountability
-  Goal-setting skills with apparent planning
-  A true need for such funds

### Grant Submission Deadline: November 1, 2024

Submissions should be received at the Beauport Financial office on or before November 1, 2024. All applicants will be notified of Beauport Financial's decision following the selection process. Grant winners will be formally announced at our annual holiday party!

All grant submission materials should be mailed, faxed, or brought (please, no emails) to:

**Beauport Financial Services, LLC.**  
**Attention: Richard D. Wilson Community Response Gift Fund**  
**3 Heritage Way, Suite 2**  
**Gloucester, MA 01930**  
**Phone: 978.283.0748 Fax: 978.283.5576**

# REQUIREMENTS & PROCEDURES FOR SUBMITTING A GRANT PROPOSAL

## Grant Submission Checklist

- Application Form:** The one-page Richard D. Wilson Community Response application form must be completed in its entirety, including all necessary signatures by all organizations applying for grants.

### Proposal

- A one-page proposal narrative should be submitted with the application form giving a more detailed description of the program or project.
  - The proposal should be presented on the charity's or member office's letterhead.
  - It should contain a concise description of the project's purpose and need, and a summary of the specific amount of funding requested along with any other funding sources that have been contacted, and any commitments that have been received.
  - Please also discuss how goals for the funding will be achieved and evaluated.
  - The Beauport team will give primary consideration to charities sponsored by Beauport clients who have a direct, personal involvement with the charity (i.e. their time, contributions, etc.). Please include the extent of your involvement with the charity with the proposal.
- Board of Directors:** Include a list of the names and contact information of the members of the petitioning organization's governing board and its senior officers.
  - Proof of Tax-exempt Status:** Please provide a copy of federal tax-exempt determination letter under section 501(c) (3) from the Internal Revenue Code.
  - Other Materials:** Please feel free to include materials about the charity such as marketing materials (brochures, photos, etc.) along with the one-page application and one-page narrative proposal submitted inside a labeled folder.

We welcome your call to clarify any aspect of the program.

Thank you,  
The Beauport Financial Team

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