



United Heritage Charity Foundation

2009 S CAPITAL OF TEXAS HWY STE 110 AUSTIN, TEXAS 78746 512.435.4545 800.531.2328 UHCF.ORG

DONATION REQUEST POLICY

Founded in 2003, the United Heritage Charity Foundation was developed to support the many charitable projects in which United Heritage Credit Union participates. Since its inception, the Charity Foundation has distributed funds to numerous local charities including children's organizations, cancer research, veterans and education initiatives. The Charity Foundation is flooded with numerous requests for sponsorships and donations, therefore the following guidelines must be followed to ensure fairness and maximize the benefits the Charity Foundation can give to the community.

Requests must be made at least **eight weeks in advance** of the event date.

All requests must be made in writing on company letterhead and mailed or faxed to:

United Heritage Charity Foundation
PO Box 1648
Austin, Texas 78767
Fax: 512.306.9362

Please be sure to include the following:

- Description/mission of the organization**
(brochures or an information packet are encouraged)
- Date, time, location and description of event, if applicable**
(brochures or an information packet are encouraged)
- Event purpose/beneficiary and amount hoped to be raised through this event, if applicable**
- Donation request and how donation will be used**
- Verification of 501(c)(3) non-profit status**
- Current financial summary**
- Contact name, telephone number and complete address**

OUR AREA OF FOCUS:

The United Heritage Charity Foundation places priority on contributing to deserving organizations that make a difference in our local communities. To maximize our efforts, we support education initiatives, medical research, veterans, and organizations that support sick and neglected children. Preference is given to organizations and requests that address one or more of those areas of focus.

Support for out-of-area requests is limited. Our operating area consists of the Travis, Williamson, Bastrop, Caldwell, Hays, Smith and Wood counties.



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DONATION REQUEST FORM

Please fill out the information below and fax or mail at least eight weeks in advance of your event date.

REQUESTING ORGANIZATION:

CONTACT NAME:

PHONE: EMAIL:

MAILING ADDRESS:

CITY: STATE: ZIP:

If your donation is granted we may request that you pick up the donation. Which United Heritage Credit Union branch is most convenient to you?

- Cedar Park** 1801 E Whitestone Blvd (FM 1431)
- Georgetown** 12 Waters Edge Cir
- Kyle** 5029 Kyle Center Dr (S FM 1626)
- Lakeway** 3317 S Ranch Rd 620
- North Austin** 12208 N Mopac Expy
- River Place** 10815 Ranch Rd 2222
- Round Rock** 301 Mays Crossing Dr
- South Austin** 6400 Manchaca Rd
- Southeast Austin** 1900 Woodward St — 3 Drive-Thru Lanes at Austin FCU
- Southwest Austin** 5011 W Slaughter Ln
- Tyler** 522 S Broadway Ave
- Westlake** 2009 S Capital of Texas Hwy

How did you hear about the United Heritage Charity Foundation?

- Online Search
- Credit Union Staff/Lobby Signage
- Networking Group
- Family/Friend
- Other

Is this donation request in association with a particular event? YES NO

If yes, give a description of the event. (i.e. Name, Date, Time, Location, Number of people attending, Event purpose or beneficiary, Amount hoped to be raised.) Brochures or an information packet are encouraged.

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What is your donation request?

How will this donation be used?

What is the deadline for receiving the donation item? (Eight-week minimum)

If approved, check should be made payable to:

Does the IRS classify requesting organization as a 501(c)(3) non-profit organization? YES NO

Has the United Heritage Charity Foundation or United Heritage Credit Union contributed to the requesting organization in the past? YES NO

If yes, what item and when?

How will sponsors be promoted to the media?

Deadline for inclusion in printed materials? (Eight-week minimum)

Please give additional comments, directions or details we may need to know:

The undersigned hereby certifies that a) the information in this application and supporting documents are correct to the best of his/her knowledge; and b) the Internal Revenue Service 501 (c)(3) determination has not been revoked, cancelled, or modified; and c) funds will be used for the projects outlined in the application and agreed to by both parties.

SIGNATURE

DATE

FOR OFFICE USE ONLY: APPROVED REJECTED DATE FILLED _____
PICK UP SIGNATURE _____ DATE _____