



CHARITABLE CONTRIBUTION, GIFT, AND DONATION REQUEST GUIDELINES

Since 1905, Ozona Bank has been committed to supporting the economic growth & collective enrichment of our communities through charitable donations and corporate sponsorships. To request a donation or sponsorship from Ozona Bank, please review the approved donation policy and eligibility guidelines below.

All requests must be submitted in writing, accompanied by an Ozona Bank Charitable Contribution, Gift, and Donation Request Form (page 2).

Request form and supporting documents may be submitted in person to your local Branch Manager, mailed, or emailed to:

Ozona Bank
Attn: Marketing and Advertising Mgr.
Dainas@ozona.bank
101 River Rd.
Wimberley, Texas 78676

A minimum of 45 days notice is required for consideration.

All requests will be evaluated on an individual basis; first, by the Branch Manager upon receipt, then by the Director of Marketing & Sales on the second or fourth week of each month. Ozona Bank reserves the right to decline any requests, by any and all parties, regardless of whether they meet the criteria set forth in this policy or not. Ozona Bank also reserves the right to provide gift-in-kind contributions in lieu of cash requests for organizations that meet the criteria set forth.

Eligibility Requirements:

Any organization or group requesting a contribution from Ozona Bank must meet the following criteria:

- organization must be within the United States;
- located in a community in which Ozona Bank serves;
- submit a written request with supporting documentation a minimum of 45 days prior to event date or deadline;
- activity or event must NOT be sensitive, controversial, harmful, or pose a potential conflict of interest to Ozona Bank;
- organization must not discriminate on the basis of race, religion, age, gender, sexual orientation, disability, national origin, ancestry, or veteran status.

Ozona Bank may NOT consider contributions to the following:

- individuals or organizations seeking funds for personal or individual endeavors
- individuals or organizations that are not representative of the communities Ozona Bank serves
- political organizations or candidates seeking funds for public office

Additional Consideration Criteria:

In addition to the Eligibility Requirements listed above, each request will be given consideration based on the following:

- the requesting organization's source of support;
- the donation's (if approved) overall impact on the community or communities served;
- the donation's (if approved) overall impact on Ozona Bank and its customers;
- the size/amount of the contribution request; and
- funds availability

Please direct questions regarding Ozona Bank's charitable contribution policy to dainas@ozona.bank



Today's Date: _____

CHARITABLE CONTRIBUTION, GIFT, AND DONATION REQUEST FORM*All requests must be submitted in writing and form must be completed for consideration; incomplete forms will not be considered.***Organization Details**

Name:					Contact Name/ Title:		
Mailing Address:							
Phone Number:				Email Address:			
501 (c) 3?:	☐ YES	☐ NO	Tax ID #:			Is the organization a customer of Ozona Bank (not required for consideration):	☐ YES ☐ NO
Mission/ Primary Purpose:							
If approved, we should make check payable to?:				If approved, where should check be mailed to?:			

Event Details

Name of Event:					Date of Event:		
Purpose of the event:							
Have you received support for this event from Ozona Bank in the past?:	☐ YES	☐ NO	If YES, what year?:			How many will be attending?:	
Is this an Annual Event?:	☐ YES	☐ NO	If YES, what annual?:				

Request Details**Support Requested (please select one):**

☐	MONETARY DONATION	<i>A donation is defined as an act or instance of presenting something as a gift, grant, or contribution to a not-for-profit organization, for which a tax receipt may be issued.</i>					
Amount Requested:			Date Needed:				
☐	MONETARY SPONSORSHIP	<i>A sponsorship is defined as an agreement with another organization (can be not-for-profit or for-profit) in which marketing opportunities are purchased.</i>					
Amount Requested:			Date Needed:	File Type:	Select One	Send To:	
☐	GIFT-IN-KIND DONATION	<i>A gift-in-kind donation is defined as a charitable gift in lieu of donating money to the organization (can be not-for-profit or for-profit) to purchase the needed goods and/or services</i>					
Item(s) Requested:				Date Needed:		Quantity Requested:	

Verification

Signature:				Date:			
<i>By signing this form, I verify that I am an authorized agent of the requesting organization and have authority to complete this request.</i>							

Internal Use Only

Date Received:			Receiving Employee:			Branch Mgr:	Select One
Notes:							
Approved?:	☐ YES	☐ NO					