



Jerome J. and Dorothy H. Holz Family Foundation

2018 GRANT APPLICATION

THIS GRANT APPLICATION FORM MUST BE SUBMITTED FOR ANY CONSIDERATION OF A GRANT REQUEST.

1. **Name of applicant organization** (Please use full legal name)

2. **Street Address:** _____

City/State/Zip: _____

3. **Phone Number:** _____ **Email Address:** _____

4. **Affiliate Organizations:** Is the applicant organization affiliated with other organizations? If yes, please list names

5. **Purpose for Request:** Please attach a detailed description of the program or purpose for this request and its intended benefits with this Grant Application Form. Descriptions limited to 500 words or less are appreciated. Provide a brief program or project title here.

6. **Amount Requested \$** _____

7. **2017 Holz Family Foundation Funding:**

a. Did the applicant organization receive funding from this foundation in 2017? _____

b. If yes, please include a Grant Report with this Grant Application Form.

Amount Funded \$ _____ **Program** _____

8. **Tax-Exempt Status:**

a. Is the applicant organization tax-exempt under the Internal Revenue Code section 501(c)(3)? _____

b. If yes, is the organization an operating tax-exempt organization? _____

c. If the applicant organization is not tax-exempt under 501(c)(3), will a charitable donation to this organization qualify as tax-exempt under IRC section 170(c) _____

9. **Other Support:** What other sources have you approached for support for this project?

10. **Operating Deficit:** Has the applicant had an operating deficit within the last five years? If yes, please list years and deficit amounts.

11. **Administrative Costs:**

a. Will any part of this grant be used for administrative costs, salaries, or fund raising appeals? _____

b. What percentage of grants received during 2017 was used for fund raising? _____%

12. **Compensation:** Please report titles and compensation for the three highest paid employees of the applicant organization. This is only required for 501(c)(3) tax-exempt organizations.

Title	_____	Compensation \$	_____
Title	_____	Compensation \$	_____
Title	_____	Compensation \$	_____

The undersigned, a representative of the applicant, submits this grant application for consideration and states that the above information is true and correct and that its tax-exempt status has not been revoked or modified.

By: _____
(Print Name & Title) (Signature) (Date)

2018 GRANT APPLICATIONS ARE DUE MAY 1ST 2018

PLEASE INCLUDE THE FOLLOWING WITH YOUR GRANT APPLICATION

1. Federal determination letter for IRC 501(c)(3) tax-exempt status, if applicable.
2. Most recent annual and current year interim financial statements
3. Budget for this grant request
4. Names and addresses of Board Members and Officers
5. Detailed purpose for grant request
6. 2017 Grant Report, if applicable

Please attach all documents in a single email addressed to holzfamilyfoundation@gmail.com

Grant Application Information

Blank Grant Applications can be downloaded at holzfamilyfoundation.com. Completed Grant Applications and all accompanying documents can be emailed as attachments to holzfamilyfoundation@gmail.com

Alternatively, all materials can be mailed to the address below.

Jerome J. and Dorothy H. Holz Family Foundation
c/o Jerome J. Weis
P.O. Box 487
Hales Corners, WI 53130

Please be sure to include all of the required accompanying documents listed in the grant application when submitting.

1. Federal determination letter for IRC 501(c)(3) tax-exempt status, if applicable.
2. Most recent annual and current year interim financial statements
3. Budget for this grant request
4. Names and addresses of Board Members and Officers
5. Detailed purpose for grant request
6. 2017 Grant Report, if applicable

The deadline for completed grant applications is May 1st.

Grants are made only to operating non-profit organizations exempt from Federal taxation under the Internal Revenue Code.

Grant Application Procedure

The deadline for completed Grant Applications in each fiscal year is May 1st. Additional information or clarification may be requested prior to final grant determinations.

Completed Grant Applications are reviewed annually by the trustees at our summer meeting, generally held in early July. If your Grant Application is approved, a check will be issued in August. All grantees are required to sign and return the Grant Acknowledgement forms which will be included with the grant check immediately after the check is received.

All Grant Applications received after May 1st will be reviewed at the summer meeting in the next fiscal year. We encourage organizations to submit Grant Applications in March or April so that the information is as current as possible at the summer meeting.

Basic Grant Policies

Grants are made only to operating non-profit organizations exempt from Federal taxation under the Internal Revenue Code.

The Foundation will operate without discrimination towards age, race, religion, sex, or national origin.

Priority will be given to projects and programs in Milwaukee and Waukesha Counties that mainly benefit:

- Education of youth and child development
- Special education of handicapped individuals
- Student services and organizations
- Zoos and zoological societies
- Community projects and events

Grants are not made to individuals.

Grants are not made for general fund raising, deficit financing, or loans.

Grants are generally not made for religious purposes.

Grants are not made to labor or political organizations.