



SHAPIRO GROUP GRANT APPLICATION

2017

- Technology Grant
- Advocacy Grant
- Education

- Marketing Grant
- Planning/ALM Grant
- Just Ask / Misc. Grant

Date: _____

Credit Union Name: _____ Asset Size: _____

Credit Union Address: _____

CEO's Name: _____ Phone Number: _____

Email Address: _____ Amount Requested: \$ _____

We have donated \$ _____ to Shapiro Group in 2016/2017

Please attach a copy of the following items with your Grant Request:

- An explanation for your request, your strategic plan for the grant funds, and how they will benefit your credit union
- A copy of your most recent income statement, balance sheet, including CU current Net Worth and ROA
- Please include how your credit union has contributed toward the Shapiro Group.

The credit union agrees to:

- To make a cash donation to the Shapiro Group of at least 10% of the grant awarded, over a period of up to 12 months.

These guidelines are subject to modification at any time and are contingent upon the availability of funds. The maximum annual, individual, credit union grant funding is limited to \$3,500, with the exception of Technology grants for a funding of \$5,000 every other year. Credit unions with capital/net worth of less than 12% represent the greatest need within the Shapiro Group, therefore, credit unions with capital/net worth equal to or greater than 12% are not eligible to obtain a grant in 2017. Credit unions with an operating expense/gross income ratio greater than 85%, and/or have a net worth below 7%, and therefore under PCA, will be subject to additional review before approval. The Shapiro Group will disburse grant funds after final approval and proof of service.

By submitting this grant application, your credit union acknowledges it is in good standing, complies with the terms above, and agrees to make a cash donation to the Shapiro Group and provide a statement of benefit upon request within a 12 month period.

- My credit union is a member of the CA or NV Credit Union League and is not at risk of nor seeking a merger in the next 18 months.

Signed:

CEO's Signature

Date

Please complete and submit for approval by September 5, 2017.

All grant request received after this date will be considered for the following calendar year.

Submit by Email, mail or fax to:

Credit Union Development Department
Shapiro Group – Attn: Deanne Figueras
PO Box 51476, Ontario, CA 91761-0076

Questions: deannef@ccul.org | 909.212.6025

