

The B&N Wagner Family Foundation

c/o C&N Wealth Management

P.O. Box 58

Wellsboro, PA 16901

(570) 724-0243 or (800) 487-8784

Email: Trust@cnbankpa.com

[Please verify that your request is consistent with the Mission of the Foundation.]

Mission: *This Trust and Foundation is created and shall be operated exclusively for religious, charitable, scientific, literary, or educational purposes within the geographic areas of the Northern Tier of Pennsylvania or Southern Tier of New York, located in the United States, any state or territory, the District of Columbia, or any possession of the United States.*

Deadlines: Applications received by March 15th will be decided by approximately June 1st.

Applications received by September 15th will be decided by approximately December 1st.

The Applicant should return the completed application to the foundation at the above address or email provided. The directors of the foundation will review the application and make a determination for the grant distribution at their next regularly scheduled meeting.

Instructions:

- (a) All questions must be completed, if applicable.
- (b) Applicant must be recognized by the Internal Revenue Service as a public charity with a 501 (c)(3) Determination Letter in order for the Applicant to be considered by the Trustees. A copy of the applicant's IRS Determination Letter, including Applicant's charitable status must be attached to the Application.
- (c) If your organization is required to file IRS Form 990, please submit the most recent copy. If organization is not required to file IRS Form 990, please submit most recent audit or current budget.
- (d) For capital projects please submit a minimum of two bids for any grant requests in excess of \$1,000.
- (e) A representative from your organization may be asked to meet with the Directors of the foundation before your request is considered.

Date of Application: _____

Name of Applicant Organization: _____

Address: _____
Street or PO Box City State Zip

EIN: _____
Federal Taxpayer I.D. #

Phone: _____ **FAX:** _____ **Web Site:** _____

Email Address: _____

Contact Person: _____ **Title:** _____

Contact Person Phone #: _____ **Email Address:** _____

List All Directors/Trustees:

NAME	ADDRESS
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Is your organization an IRS 501 (c) (3) not-for-profit? Yes No
[Attach IRS Determination Letter]

Summarize your organization's mission: _____

Total Cost of Project: \$ _____

Total Amount Requested: \$ _____

PROPOSED USE OF REQUESTED FUNDS: _____

Amount Requested from the Wagner Family Foundation: \$ _____

Anticipated Completion Date of your project: Month _____, Year _____

(If you anticipate that your proposed project cannot be completed during this calendar year, provide explanation here:

FINANCIAL INFORMATION:

List other private and public funding sources for this particular request:

RECEIVED:

Funding Source: _____ Amount: \$ _____ Date Received: _____

Funding Source: _____ Amount: \$ _____ Date Received: _____

Funding Source: _____ Amount: \$ _____ Date Received: _____

PENDING:

Funding Source: _____ **Amount Requested:** \$ _____

Anticipated Receipt Date: _____

Funding Source: _____ **Amount Requested:** \$ _____

Anticipated Receipt Date: _____

Funding Source: _____ **Amount Requested:** \$ _____

Anticipated Receipt Date: _____

For applicants that are exempt from filing IRS Form 990, please supply the following information:

Gross Value or Net Worth of Applicant: \$ _____

Annual Gross Income: \$ _____

Major Sources of Income: \$ _____

Total Debt (including credit card): \$ _____

Over the past five (5) years has the applicant ever received monies from any other Foundation? Yes ___ No ___. If so, indicate the following: **Foundation, Date, Purpose, and Amount Received:**

Name:	_____	_____	_____	_____	<u>Purpose</u>
20__	\$ _____	\$ _____	\$ _____	\$ _____	_____
20__	\$ _____	\$ _____	\$ _____	\$ _____	_____
20__	\$ _____	\$ _____	\$ _____	\$ _____	_____
20__	\$ _____	\$ _____	\$ _____	\$ _____	_____
20__	\$ _____	\$ _____	\$ _____	\$ _____	_____

Applicant will be notified of the action taken by the Administrative Committee. If a grant is awarded you will be notified of the amount and the terms of your grant. Following completion of the project, you will be required to submit a Grant Compliance Form.

If the project is not completed or is terminated, notify the Foundation immediately. If an applicant ceases to exist, and it possesses property purchased with Foundation money, said property may be required to be returned to the Foundation. The Applicant hereby agrees that it will furnish any and all additional information required by the Foundation in connection with the grant request, and if applicable, will allow representatives of the Foundation to visit the premises involved with the grant for inspection at any reasonable time.

Respectfully Submitted By: _____
NAME OF ORGANIZATION

By: _____
SIGNATURE OF AUTHORIZED REPRESENTATIVE TITLE

Attest:

By: _____
SIGNATURE SECRETARY OF ORGANIZATION