

The ValMark Securities Global Gift Fund™

Information and 2011 / 2012 Application





Executive Overview



PURPOSE:

"A commitment with member firms to make an immediate and eternal impact by actively sharing the love of God with those in need around the world."



HOW IT WORKS:

ValMark tithes each year from its corporate profits and contributes this money to The ValMark Securities Global Gift Fund. The fund's board members allocate these funds to various charitable organizations around the world.



ELIGIBLE RECIPIENTS:

Eligible recipients are tax-exempt organizations that are nominated by ValMark member firms. Priority is given to charities in which ValMark member firms are personally and financially involved.



BOARD MEMBERS:

- Mark Armstrong
- Billie-Dee Briggs
- Caleb Callahan
- Dean Kohmann
- Jeff Kruger
- Adam Rissmiller



The ValMark Securities Global Gift Fund™

Requirements & Procedures For Submitting a Grant Proposal

Eligibility & General Information:

The ValMark Securities Global Gift Fund makes grants only to non-profit tax-exempt charitable organizations that are exempt under Section 501(c)(3) of the Internal Revenue Code. (Non-exempt organizations may apply, provided the purpose is within the defined goals of the Global Gift Fund mission **and** a qualified tax-exempt organization agrees to act as the receiving agent and fund manager. The agent and the applicant will both be accountable to the Global Gift Fund for the proper expenditure of the funds).

The maximum request considered is \$10,000.00. The project or work for which funds are requested must exhibit:

- A high probability for success
- A qualified staff and responsible Board of Directors
- A method for ensuring financial accountability
- Goal-setting skills with apparent planning
- A true need for such funds
- The sponsoring Member Office's personal involvement of money, time, etc.

Grant Submission Due Date: **March 16, 2012**

Submissions should be received at the ValMark office on or before the deadline. Late proposals will be considered in the unlikely event there are unspent funds. Applicants will be notified of the Board's decision following the meeting when action is taken. All grant submission packets should be mailed to:

ValMark Securities Global Gift Fund
Attention: Caleb Callahan
130 Springside Drive, Suite 300
Phone: (800) 765-5201 Fax: (330) 576-1250





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The 5 Item Submission Packet Checklist:

- Application Form:** The one page ValMark Securities Global Gift Fund Grant Application Form must be completed in its entirety, including all necessary signatures, by all organizations applying for grants.
- Proposal:** A one-page proposal narrative should also be submitted with the application form giving a more detailed description of the program or project. The proposal should be on the charity's or member office's letterhead. It should contain a concise description of the project or need, the specific amount requested from the Global Gift Fund and the purpose or need for the request. The proposal should also contain a summary of the total funds needed and other funding sources that have been contacted and any other commitments that have been received. Please also discuss how goals will be achieved and evaluated. Also, the GGF Board strongly supports charities with which the Member Office is personally involved with time and money. Please discuss such involvement in this proposal.
- Board of Directors:** Include a list of the names and addresses of the members of the petitioning organization's governing board and its officers.
- Proof of Tax-exempt Status:** A copy of federal tax-exempt determination letter under section 501(c)(3) from the Internal Revenue Code.
- Other Materials:** Please feel free to include various information pieces about the charity such as marketing materials, brochures, photos, etc. Please include these along with the one page application and one page written proposal inside the submission packet.



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GRANT APPLICATION FORM (SUBMISSION DEADLINE MARCH 16, 2012)

I. CHARITY INFORMATION

Name of your charity _____
Mailing Address _____ City _____ State _____ Zip _____
Fed. Tax ID # _____ Exempt under Sec. 501(c)(3) of the IRS Code? Yes _____ (attach IRS determination letter)

(If no, please read eligibility requirements and attach detailed “explanation of eligibility”)

What is the purpose or **Mission Statement** of your organization? _____

Chairman of the Board _____ Phone () _____
Address _____ email _____

Executive Director _____ Phone () _____
Address _____ email _____

Treasurer _____ Phone () _____
Address _____ email _____

II. GRANT REQUEST INFORMATION

Amount of Request: \$ _____ for (check one): General Operations _____ Special Project _____

In one sentence, please summarize how the funds requested will be used (attach one page proposal) _____

Why do you think this is needed? _____

Person responsible for project/proposal _____ Phone _____
Address _____
(If you need additional space, please attach separate pages and any additional support materials you wish to include)

We hereby apply for a grant in the amount listed above and certify that the information contained herein and in the attached materials is true and correct to the best of our knowledge.

Organization: _____
(Please Print)

By (authorized officer): _____ Title _____
(Please Print)

Signature _____ Date _____

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ValMark Securities, Inc. member FINRA, SIPC
ValMark Advisers, Inc., a SEC Registered Investment Advisor
130 Springside Drive, Suite 300 • Akron, OH 44333 • Phone: 800-765-5201