



# Corporate Benevolence Program

Set Up Form

# Corporate Benevolence Program

A Corporate Benevolence Program (CBP) is set up to assist employees during times of emergency, such as financial crisis, natural disasters, national emergencies, family crises, etc. through the use of a donor advised fund with The Signatry. The founding organization sets the parameters and scope of use of the fund, in accordance with IRS guidelines. Employees of the organization may contribute to the corporate fund as the founding organization determines appropriate.

Consider the following questions to customize your Corporate Benevolence Program.

## Program Funding

1. What is the annual funding goal? \$ \_\_\_\_\_

2. Ideally, who will make the tax-deductible contributions?

Corporate donation \$ \_\_\_\_\_ or \_\_\_\_\_%

Employee donation \$ \_\_\_\_\_ or \_\_\_\_\_%

Other \$ \_\_\_\_\_ or \_\_\_\_\_%

3. Will employee contributions be made ad hoc or offered through an employee paycheck deduction option?

The Signatry will acknowledge all contributions with an IRS-compliant receipt for tax purposes. All contributions are irrevocable. Eligibility for consideration is not tied to contribution participation.

## Types of Needs for Consideration (Recipient Filter)

1. What areas of financial need would the program ideally cover?

Health/Medical

Memorial (Expenses associated with loss)

Education

Military

Adoption

Mission

Counseling

Other \_\_\_\_\_

Family emergency

2. What individuals will be considered eligible for assistance?

Employees

Customers' employees

Families of Employees

People in the community in which the business operates

Friends of Employees

Other \_\_\_\_\_

Vendors' employees

Continue on next page.



3. Do you want to consider people for assistance on a recurring basis? \_\_\_\_\_

4. What range of support is ideal?

Low (\$100 or more) \$ \_\_\_\_\_ +

High \$ \_\_\_\_\_ +

## Due Diligence

1. The Helping Hands Project Coordinator will gather the following information from the potential recipient in order to substantiate the financial need.

- Most recent tax return
- Budget
- Documents referencing expenses creating the financial need

2. Are there other factors the committee would like to review to establish the financial need?

3. How involved will the committee be in gathering documentation?

## Program Leadership

1. What is the vision for your Corporate Benevolence Program?

2. Who will be on the Corporate Benevolence Committee?

3. How are members selected, and how long will they serve?

4. What responsibilities will they have?

5. How will the program be promoted?

6. Who on the committee will be the initial point of contact when a person is in need?

Continue on next page.



## Setting Up the Committee and Helping Hands Process

- We recommend that each member of the committee adhere to a privacy policy given the information considered.
- We recommend that the committee establish a person as the initial point of contact. This person would administer a basic level of questions to determine that the need fits with the CBP. If the need fits this first filter, then the person is referred to the Helping Hands (HH) Project Coordinator. The HH Project Coordinator is trained to talk with potential recipients to obtain the necessary due diligence information in a private and secure manner and consider the true need.
- The HH Project Coordinator discusses with the CBP Committee contact person the amount and terms of support recommended.
  - The CBP committee can agree to fund all or a portion of the recommendation.
  - Helping Hands provides all due diligence to establish the true financial need and completes all required expenditure responsibility reporting for the grant. This reduces the time required by the committee members and creates a standardized process to evaluate all CBP projects.

The ultimate decision in the distribution of funds rests with Helping Hands Ministries, Inc.

Consider including a nearby ministry or charity or other individuals and distribute 5% to the broader community, so CBP is not considered an employee benefit.

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**There is great beauty in collaborative generosity. We look forward to serving you and your company's employees.**

For further questions, or to return the completed form, please contact The Signatry Donor Care team at [donorcare@thesignatry.com](mailto:donorcare@thesignatry.com).



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