

Volunteer Grant Program Guidelines



PHOENIX

Phoenix recognizes employees for contributing their valuable time to charitable organizations in their communities. Through the Volunteer Grant Program (the “Program”), Phoenix provides maximum grants of \$500 to eligible nonprofit organizations which Phoenix employees give time to throughout the year.

▶ ELIGIBLE PARTICIPANTS

The Program is open to full- or part-time employees of The Phoenix Companies, Inc. who:

- volunteer a minimum of 40 hours a year to a nonprofit organization; or
- are active board members of a nonprofit organization.

▶ ELIGIBLE ORGANIZATIONS

In order to receive a grant, the nonprofit organization must be recognized as tax-exempt as defined under Section 501(c)(3) of the U.S. Internal Revenue Code.

▶ CONDITIONS

Program grants will be awarded based on the number of applications received and the available Program budget. The maximum amount will be \$500 per employee per calendar year.

Nonprofits meeting the specific criteria will be considered for participation. Phoenix may request additional documentation at any time.

HOW TO APPLY

The employee completes a Volunteer Grant Program application and submits it to the nonprofit organization. The nonprofit organization will verify (a) the employee is a regular volunteer or (b) an active board member, and will forward the form to Phoenix.

Applications are due to Phoenix by November 30 for volunteer service performed during the current calendar year. The organization will receive its grant by year-end.

An employee may request up to two program grants per year by completing two forms. The \$500 grant will be divided equally between the organizations.

FOR MORE INFORMATION, CONTACT:

Babette Mantilla
Volunteer Grant Administrator
Phoenix
One American Row, PO Box 5056
Hartford, CT 06102-5056
(860) 403-6340
(860) 403-5871 fax

The Phoenix Volunteer Grant Program reserves the right to make final determination as to the eligibility of all donors and recipients and reserves the right to discontinue or amend any part of the Volunteer Grant Program.

VOLUNTEER GRANT PROGRAM APPLICATION

PART A - To be completed by the Phoenix Volunteer

Please fill out Part A completely and send this form to the eligible charitable organization for which you (a) regularly volunteer, or (b) are an active board member.

Name (Last, First, Middle Initial)		Phoenix Employee ID #
Business Address and Mail Code		Office Phone Number ()
Name of Charitable Organization and Key Contact	Address of Charitable Organization	
Primary mission of this organization: (e.g. youth programs, social services, culture)		

I am a regular volunteer (40 hours or more per year) I am an active board member

Provide a brief description of your involvement with this organization:

I certify that the above information is true and correct and that I received no tangible benefit for my services.

Signature Date

PART B - To be completed by the nonprofit organization

Please complete Part B and mail, fax or email this form to:

The Phoenix Volunteer Grant Program
One American Row, PO Box 5056
Hartford CT 06102-5056
Attention: Babette Mantilla, H-12
Email: babette.mantilla@phoenixwm.com
Fax: 860-403-5871

I certify that the applicant named in Part A was (a) a regular volunteer, or (b) an active board member during this calendar year. I also certify that our organization is tax exempt as defined under Section 501(c) (3) of the U.S. Internal Revenue Code and complies with the requirements for eligibility under the Phoenix's Volunteer Grant Program as described in the guidelines.

Contact	Title	
Organization	Federal ID #	
Phone Number ()		
Street Address		
City	State	ZIP Code
Signature	Date	