

Background

Butterfield's Sustainability Strategy is aligned to the UN Global Compact and has a specific focus on the following:

- ENVIRONMENT** Mitigating impacts and maximising opportunities associated with the transition to a low-carbon economy.
- COMMUNITIES** Supporting thriving communities.
- OUR PEOPLE** Creating an inclusive and diverse culture.

What will Butterfield fund?

Butterfield will provide funding to **local registered charities** for projects or programmes that align with our strategy. Specifically, we will prioritise the following areas:

- ENVIRONMENT** Projects/programmes committed to environmental protection, climate action, life below water.
- COMMUNITIES** Projects/programmes supporting education, local economic development, health and well-being.
- OUR PEOPLE** Projects/programmes working towards reducing inequalities or supporting DE&I causes.

Additionally, applications which align to Butterfield's priority **Sustainable Development Goals** will be considered favourably:

- | | |
|--|--|
| SDG 3 Good Health & Well-Being | SDG 12 Responsible Consumption & Production |
| SDG 4 Quality Education | SDG 13 Climate Action |
| SDG 5 Gender Equality | SDG 14 Life Below Water |
| SDG 8 Decent Work & Economic Growth | |

Exclusions

Butterfield's Charitable Donations will not fund the following:

- Budget deficits
- Capital projects
- Conferences or seminars
- Entertainment (banquets, receptions or entertainment)
- Individuals
- Political, partisan and religious associations
- Projects for commercial gain
- Sporting events or teams

Assessment criteria

Butterfield will assess all applications to the following criteria:

- STRATEGIC** Activities that are based on a strategy with both short and long-term objectives, focusing on a few key areas for greatest impact.
- ALIGNED** The request aligns with Butterfield's sustainability strategy and priority Sustainable Development Goals, as well as with the development priorities of local communities, the non-profit sector, and government.
- SUSTAINABLE** The request: (i) seeks to avoid dependency on short-term funding, (ii) creates long-term benefits, and; the project/programme will be sustained at the end of the funding period.
- MEASURABLE** There is a significant need for the funding (ideally based on evidence) and the return on community investment can be measured in terms of outcomes and impact.
- OPERATIONAL** Requested and submitted documents conform to Bermuda laws, the latest financial accounts show a solvent position, are produced on a timely basis in accordance with the relevant Financial Reporting Standard and are independently verified.

Applications will be reviewed quarterly. You will be notified if your application is successful or not.

Please submit applications to **Butterfield Charitable Donations Committee** at giveback.BDA@butterfieldgroup.com.

Clients and other individuals have certain rights with respect to the data held by Butterfield. The details of the individual rights, as well as how we handle the data provided to us, can be found in our Privacy Statement which can be obtained from www.butterfieldgroup.com or by contacting LICBermuda@butterfieldgroup.com. The Bank of N.T. Butterfield & Son Limited is licensed to conduct banking business by the Bermuda Monetary Authority. Address: 65 Front Street, Hamilton HM12, Bermuda.

CHARITABLE DONATION APPLICATION FORM

Marketing

GENERAL INFORMATION

Submission date: (DD/MMM/YYYY)

Organisation name:

Registered charity number: *Please attach copy of charity license.*

Charity license expiration date: (DD/MMM/YYYY)

Contact name:

Title:

Telephone:

E-mail:

Mailing address:

Charity website:

Charity social media handles:

Last previous donation/sponsorships from Butterfield: Amount: Date: (DD/MMM/YYYY)

Member of the Nonprofit Alliance of Bermuda? (Previously Inter Agency Committee): Yes No

DONATION REQUEST CATEGORIES (select all that apply)

<input type="checkbox"/> Health & Well-being	<input type="checkbox"/> Education	<input type="checkbox"/> DE&I
<input type="checkbox"/> Reducing inequalities	<input type="checkbox"/> Local economic development	<input type="checkbox"/> Environment protection
<input type="checkbox"/> Climate action	<input type="checkbox"/> Life below water	

Brief overview of the organisations' objectives or mission statement (if applicable)

How does your organisation benefit Bermuda and our community?

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CHARITABLE DONATION APPLICATION FORM

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How does your organisation contribute to Butterfield's priority areas for funding?

ORGANISATION SPECIFICS - Please include a list of all staff, Board members and consultants with this application.

Number of paid staff:

Number of Board members:

 Number of volunteer staff
(excluding board members):

Number of consultants currently engaged:

How often does your Board of Directors meet?

 Has your organisation received any type
of accreditation or certification?

 Yes No

 If **Yes**, please explain briefly:

 If **No**, are you in the process of applying
for accreditation or certification?

 Yes No

ANNUAL REVENUE

Source	\$ amount	% of total revenue
Government	\$ <input style="width: 150px;" type="text"/>	<input style="width: 50px;" type="text"/> %
Corporate	\$ <input style="width: 150px;" type="text"/>	<input style="width: 50px;" type="text"/> %
Individual	\$ <input style="width: 150px;" type="text"/>	<input style="width: 50px;" type="text"/> %
Foundation	\$ <input style="width: 150px;" type="text"/>	<input style="width: 50px;" type="text"/> %
Service fees	\$ <input style="width: 150px;" type="text"/>	<input style="width: 50px;" type="text"/> %
Membership fees	\$ <input style="width: 150px;" type="text"/>	<input style="width: 50px;" type="text"/> %
Other	\$ <input style="width: 150px;" type="text"/>	<input style="width: 50px;" type="text"/> %

Please provide the following information from your most recent (audited) financial statements:

 Fiscal year: Annual earned revenue: \$ Annual operating expenses: \$

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CHARITABLE DONATION APPLICATION FORM

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FUNDING REQUESTAmount of funding requested: BMDDescription of what the funding will be used for: (outline the programme goals and strategy to achieve them, community needs it addresses, number of people expected to benefit, and intended outcome): *(Attach a separate sheet if required.)*

CHARITY SUSTAINABILITY

Do you have a plan to ensure the sustainability of your Charity for the next three years? Please explain:

VOLUNTEER OPPORTUNITIES

Outline the various ways Butterfield volunteers can assist your organisation:

ADDITIONAL INFORMATION

Please submit the following documents with this application:

- | | |
|--|--|
| <input type="checkbox"/> Most recent financial statements | <input type="checkbox"/> Current list of Board of Directors (including their positions on Board) |
| <input type="checkbox"/> Current operating budget | <input type="checkbox"/> Current list of paid staff (including consultants) |
| <input type="checkbox"/> Project/Endowment/Capital campaign budget | <input type="checkbox"/> Copy of charity license |

<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature	Name (print)	Date (DD/MMM/YYYY)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Title		