



PERSONAL ASSISTANCE APPLICATION

Foundation File # _____

LODGE REQUIREMENTS

Foundation Grant Regulations:

- 8.2.1 All applications submitted for grants shall be prepared and sponsored by a Member Lodge within the jurisdiction of the Alberta Elks Association.
- 8.2.2 Requests from Member Lodges for Lodge projects and personal assistance grants shall be submitted to the Foundation Office utilizing forms prescribed by the Board of Trustees and issued by the Secretary.
- 8.2.3 All applications for assistance shall include a copy of the Lodge minutes where project is adopted by the Lodge and showing approval was given to make a request for assistance.
- 8.2.4 All applications for all Lodge projects and personal assistance shall be limited to an equal contribution from the Lodge. The Board of Directors shall have authority to consider extenuating circumstances in considering applications.
- 8.2.5 Requests for grants exceeding \$2,000 shall only be considered at the Annual General Meeting by the Membership and shall be submitted to the office of the Foundation thirty (30) days prior to the Annual meeting.
- 8.2.6 Financial assistance to a Lodge project shall not exceed \$5,000 per project.
- 8.2.7 Requests for grants and assistance for \$2,000 or less shall be forwarded to the Foundation office and shall be evaluated and approved by the Board of Directors.
- 8.2.8 The Board of Directors will have five days to review the request and then comment back to the Secretary-Treasurer with their comments indicating as to why or why not they support the request.
- 8.2.9 On-going Lodge projects requiring funding shall only be considered by the Foundation once in any three-year period.
- 8.2.10 Applications for Foundation grants will not be considered for the purchase, repair, or maintenance of equipment for ELKS or Royal Purple ELKS facilities.
- 8.2.11 Verification of the Lodge and other participants' contributions shall be forwarded to the Secretary-Treasurer immediately following the conclusion of the project.

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PROCESSING TIME FOR APPLICATIONS

If the application is for an individual/person to receive a cheque from the Foundation, and not a supplier, **AGLC must** approve the funds first.

Foundation Processing Time:

Once the application and **all required information is received** (should it not require AGLC prior approval) the Secretary will send the information to the Board of Directors for review.

- 8.2.8 The Board of Directors will have **five (5) days** to review the requests and then comment back to the Secretary-Treasurer with their comments indicating as to why or why not they support the request.

Alberta Gaming, Liquor and Cannabis (AGLC):

1. Alberta Gaming, Liquor and Cannabis (AGLC) **does not** approve an individual/personal cheque to be written to an individual/person **without prior approval**.
2. Approval can take up to 5 - 7 business days from AGLC.

Once AGLC approves or denies the request, the application and all required information will be forwarded by the Secretary-Treasurer to the Board of Directors for review.

LODGE INFORMATION	
Lodge Name & Number:	
Mailing Address:	
Contact Phone Number:	
Email:	
GRANT INFORMATION	
Name of Applicant(s):	
Address of Applicant(s):	

PERSONAL ASSISTANCE APPLICATION

Brief description of assistance requested:		
Expected benefit:		
Name of Recipient or Supplier:		
Address:		
FINANCIAL REQUEST INFORMATION		
Total Donation: \$	Lodge Contribution: \$	
Amount Requested from Foundation:		\$
Travel Assistance: Maximum Travel - \$500 Foundation - \$2,000 Conference Approved Over \$2,000 Coverage is limited to a matching grant from Lodge (Lodges must receive confirmation of expenditures through receipts with copies of receipts being sent to the Foundation)		
<input type="checkbox"/> Yes	Lodge Contribution: \$	Foundation Contribution: \$
LODGE INVESTIATION REPORT		
Medical or Group Insurance: <input type="checkbox"/> Yes <input type="checkbox"/> No		How Much: \$
Other Funding: <input type="checkbox"/> Not Available <input type="checkbox"/> Other Funding (complete below): <input type="checkbox"/> Sought <input type="checkbox"/> Acquired <input type="checkbox"/> Pending		
From	Amount	Confirmed Donation
1.	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Pending
2.	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Pending
3.	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Pending
4.	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Pending

PERSONAL ASSISTANCE APPLICATION

- Proof of Net Annual Income Verified and accepted as qualified applicant
- Letter/Form from Medical Professional confirming need, cost, and duration of treatment
- Letter authorizing Publication of Grant by Foundation and Lodge
- Declaration & Agreement Form from Applicant
- Declaration & Agreement Form from Lodge Officers

An Applicant for Personal Assistance to be made by a Lodge, except where the Applicant is a Lodge Member. In such case the Applicant may apply to the Lodge or directly to the Foundation who will conduct the investigation. All information is considered confidential as provided by any Applicant be it within the Lodge, within the Lodge Committee or at the Foundation Executive.

Date Submitted to Lodge: _____

Date Reviewed by Lodge: _____

Approved by Lodge: _____

*****Please attach any supporting documents you feel pertinent to this application. (Doctor's reports, supplier quotes, etc.)***

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DECLARATION AND AGREEMENT

APPLICANT: I, the undersigned hereby make application for financial assistance from the Alberta Elks Foundation as attached and declare:

1. That I have faithfully, honestly, and diligently make this request for assistance assuring that the information I have provided is true.
2. That any assistance awarded will be used only for the purposes as stated in the application.
3. That I accept all the conditions governing awards as established by the Trustees of the Alberta Elks Foundation including permission for the Lodge and the Alberta Elks Foundation to publicize their donation as they see fit, within the limits of protecting my/our personal information.
4. That I make this declaration conscientiously believing it to be true and knowing that it is the same force and effect as if made under oath.

Dated this _____ day of _____, 20____

Applicant (or for the Applicant): _____

Print Name: _____

Address: _____

LODGE OFFICERS: We the undersigned hereby make application for financial assistance from the Alberta Elks Foundation as attached and declare:

1. That we have faithfully and diligently conducted our investigation of the Applicant's request and verified that he/she is in need of Personal Assistance as requested.
2. That any assistance awarded will be used only for the purposes as stated in the application.
3. That we accept all the conditions governing awards as established by the Trustees of the Alberta Elks Foundation.
4. That we make this declaration conscientiously believing it to be true and knowing that it is the same force and effect as if made under oath.

Dated this _____ day of _____, 20____

Exalted Ruler/Honoured Royal Lady Signature: _____

Print Name: _____

Secretary or Secretary/Treasurer Signature: _____

Print Name: _____