

## **THE ACTEC FOUNDATION**

901 15<sup>th</sup> St. NW, Suite 525

Washington, D.C. 20005

(202) 684-8460

[www.actecfoundation.org](http://www.actecfoundation.org)

### **GRANT APPLICATION FORM**

#### **APPLICATION INSTRUCTIONS**

1. All grant requests must be related to one or more areas of (i) estate planning, including preparation and implementation of wills, trusts and other documents, and related tax laws, (ii) administration of trusts and estates of decedents, minors and incompetents through probate or other procedures, (iii) business and personal planning, including investments and employee benefits, (iv) litigation involving the foregoing, (v) improvements and reform of probate, trust and related tax laws and procedures, and (vi) professional responsibility and standards related to the foregoing. Proposals should result in (i) benefit to lawyers in their practice in these areas or to law students and scholars who may be interested in this field or (ii) better service to the public in these areas.

2. Applications will normally be considered by the Foundation's Board of Directors at one of its three meetings, which are typically in early March, mid-June, and mid-October. In order to be considered by the Board, an application should be submitted to the Foundation at least 60 days before the next meeting of the Board.

3. Proposals will normally not be considered for (i) projects that parallel or duplicate existing projects considered to be adequately funded; or (ii) project costs primarily related to management, rent, utilities and similar indirect expenses or administrative overhead.

4. Priority will be given to proposals that have one or more additional sources of funding, but the presence or absence of other funding will not be determinative of whether favorable consideration will be given.

5. Unless otherwise specifically agreed, each applicant receiving a grant from the Foundation grants to the Foundation a non-exclusive royalty-free license to use all work product and other intellectual property that results from the applicant's project.

6. To be considered, a signed copy of the attached Applicant Information must be provided, and a concise but complete response to each item described in the attached Proposal Information must be included.

7. The Foundation makes no representations concerning the taxability of any grant or whether any expenses incurred in undertaking the proposal are deductible for tax purposes.

8. The application should be submitted via e-mail in a portable document format (.pdf) to The ACTEC Foundation, care of Ms. Amy Michaud, at [amy.michaud@actec.org](mailto:amy.michaud@actec.org).

**APPLICANT INFORMATION**

Full legal name and address of applicant:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
Taxpayer Identification Number

\_\_\_\_\_  
City, State, ZIP

Is the applicant a tax-exempt entity? Yes: \_\_\_\_ No: \_\_\_\_ . If so, please attach a copy of its most recent IRS determination letter.

Name, title and contact information of person signing application:

Person from whom additional information may be sought, if different:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, ZIP

\_\_\_\_\_  
City, State, ZIP

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
E-mail Address

\_\_\_\_\_  
E-mail Address

Please list previous grant applications to the Foundation by you, or organizations of which you are an active member, during the past five years:

| <b>Date of Application</b> | <b>Purpose</b> | <b>Amount Requested</b> | <b>Amount Approved</b> |
|----------------------------|----------------|-------------------------|------------------------|
| _____                      | _____          | _____                   | _____                  |
| _____                      | _____          | _____                   | _____                  |
| _____                      | _____          | _____                   | _____                  |

I hereby certify that all of the above information is true and correct to the best of my knowledge.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Signature of Applicant or person acting for Applicant

## PROPOSAL INFORMATION

Please provide the following information regarding the proposal. Additional concise material may be attached if necessary to answer a particular item. A representative of the Grant Committee will contact you if further information is required to properly evaluate your request.

1. Briefly describe the proposal for which you are seeking funds.
2. Describe who or what segment of the public would benefit from use of the Foundation funds.
3. Describe the anticipated outcome of the proposal, and the benefits to be derived as they relate to the subject areas and recipients outlined in items 1 and 2 of the Instructions.
4. Give the time frame for accomplishing the proposal. If appropriate, suggest phases into which the proposal might be subdivided and the time frame for completing each phase. If the proposal is of an indefinite duration, describe the time frame and anticipated result of the funding sought from the Foundation.
5. Describe other sources that have been secured or sought to fund the costs of the proposal.
6. State amount sought from the Foundation, and the total amount from all sources that you anticipate will be needed to fully fund the proposal. If the proposal will be completed in phases, give the amount sought and total amount required for each phase.
7. If the proposal seeks to provide ongoing services or is of an indefinite duration, describe the anticipated sources of funds to enable the proposal to continue.
8. Provide a detailed total budget for the proposal. If the proposal will be completed in phases, give the cost for each phase. Describe the specific items in the budget for which Foundation funds are sought.