



WaterStone Bank Foundation Sponsorship Request Guidelines

Each year, the WaterStone Bank Foundation receives a large number of charitable donation requests from nonprofit organizations. In order to make your request as effective as possible, we strongly urge you to read this document thoroughly and follow the guidelines within when submitting a request to the bank foundation.

Though there are many deciding factors that influence the foundation committee's funding decisions, the bank primarily donates to organizations that:

- **are registered 501(c)3, tax-exempt nonprofits.** We do not approve donations unless we can prove that they have official nonprofit tax status.
- **do work in the Greater Milwaukee area.** It is important that the benefiting organization works primarily in Milwaukee, Waukesha, Washington and/or Ozaukee counties. If the organization is national in nature, the WaterStone Bank Foundation would like to know whether and how donated funds are allocated to local initiatives. Special consideration is given to requests that specifically benefit the municipalities in Southeastern Wisconsin in which WaterStone has branch offices. View our map of branch locations at <https://www.wsbonline.com/about/locations/find-a-branch>.
- **allow us to strengthen at-risk communities** as part of the Community Reinvestment Act (see: http://www.federalreserve.gov/communitydev/cra_about.htm). Does your organization serve families in low-to-moderate income brackets? Explain whether a donation to your organization qualifies for the CRA.
- **provide recognition to the bank.** When considering grant requests, the recognition offered plays a big role in the foundation committee's decision to support an event or organization. This strategy allows the bank to save money for our shareholders; spending charitable dollars with publicity attached decreases the need to spend marketing budget dollars for similar types of exposure. How will WaterStone Bank be

recognized through a donation to your organization? Will the bank's name be printed on banners and event programs or connected with TV, radio or print advertising for your organization? Detail the ways in which the bank's name will be shared and with approximately how many people. The more information you can provide about recognition, the better.

In addition, while a request can arrive in any format, we offer the following advice when writing your requests:

- **Include a photocopy of the IRS letter that shows you are a 501c3 tax-exempt nonprofit**, as we must be able to prove the nonprofit status of every organization the WaterStone Bank Foundation committee approves for sponsorship.
- **Suggest a specific donation amount and sponsorship level.** Be clear about what that sponsorship includes and how it will benefit not only the communities you serve but also the bank.
- **Spell out what portion of a donation is tax deductible** and what isn't. Let us know the amount of the non-tax-deductible portion of an event if it comes with a table at a dinner, a golf foursome or other items of value. Representatives of the bank will sometimes attend events and sometimes will choose to donate items of value that come with a sponsorship back to the organization.
- **Offer us industry exclusivity** when tied to an event. The committee steers away from events sponsored by other banks and financial institutions. Organizations that give us exclusivity and aren't overly sponsored by other financial institutions are more likely to be approved for sponsorship.
- **Be specific, clear and concise.** Length of proposal does not dictate its success. Share concrete facts about your organization and its impact and tell us how the bank will be recognized as a result of sponsorship. Give us numbers: How many people will attend the event you would like us to sponsor? How many families will benefit? Be as concrete as possible. Please let us know how many folks have attended this event in the past and/or how many you expect to come this year. This will help us determine if the event will give the bank brand enough exposure to warrant sponsorship. If you are seeking a general donation, try to tie your request in with something specific: sponsorship of an event, a project, etc. Also, explain whether the bank will get naming rights.
- **Give us time to process the request.** Last-minute requests for sponsorship of events that are scheduled to occur days or even weeks after our monthly foundation committee meeting are more likely to be denied. Try to submit a request tied to an event at least three months before that event takes place so that if we approve funding, we have time to prepare.

In addition to the above guidelines, we recommend that you try to answer the following questions in your request:

- Are there any volunteer opportunities for our employees tied to the proposed sponsorship? If your organization offers volunteer opportunities that might be of interest to our employee base, please let us know.
- Do any WaterStone Bank employees currently volunteer with your organization? If so, please tell us. We like to honor our employees by giving back to the organizations they serve.
- Are you a WaterStone Bank customer? If so, we would like to know this as well. While banking with us isn't a guarantee of sponsorship, we are always happy to receive requests from our own customers.
- Is there a financial literacy component or tie-in to your event? The bank is committed to educating the community about financial literacy and is always seeking new opportunities to work with local organizations to educate the public about personal finance.

Still have questions? Contact WaterStone Bank's Marketing department by email at marketing@wsbonline.com or by phone at **414.459.4180**.