

Wisconsin Bankers Foundation Grant Policy

The Wisconsin Bankers Foundation invests its resources in specific projects and initiatives that further its exempt purpose of promoting financial literacy and financial responsibility to the public. Foundation grants will target areas including financial education classroom projects, financial education training, books and manuals, and financial literacy research. The Foundation will provide grants to registered 501(c)(3) organizations and certain government instrumentalities, such as public school districts. In limited circumstances, the Foundation may provide grants to organizations that do not meet this requirement, provided those organizations use grant funds to further the Foundation's exempt purpose. Such organizations will be required to enter into a restricted grant agreement as a condition to receiving grant funds from the Foundation.

The Foundation will accept grant proposals for both new and ongoing initiatives and research projects. Grants are made for a specific project on a case-by-case basis. All grant applicants are required to be located in Wisconsin. Grant applicants are required to apply through the Foundation's grant application process, which will be made available on the Foundation's website. Grants are normally made for a specific project, event or curriculum on a case by case basis.

Grants awarded for research related to financial literacy are conditioned on such research being completed within one year of the grant award. . Recipients are expected to acknowledge assistance provided by the Foundation in any publication resulting from their research. Awards are publicized in appropriate professional media and on the Foundation website, www.wibankersfoundation.com.

The following categories of proposals will be given priority in determining recipients:

1. Providing training or training materials to classroom educators for the purposes of learning financial education models.
2. Research that relates to financial education, the banking industry and consumer financial products.

Each proposal will be evaluated on its merit by the Foundation's Board of Directors.