

**CHURCH MEMBER APPLICATION FOR
ENDOWMENT FUND DISTRIBUTIONS**

Instructions:

1. Please complete this form in its entirety and remit it to endowment@2uomaha.org. Incomplete forms may not be considered by the Endowment Fund Committee.
2. Endowment Fund distributions may *only* be made for Authorized Distributions (two criteria set forth below). Endowment Fund distributions may *not* be made to fund the annual operating budget or support services. *See, e.g.*, Endowment Fund Committee Implementation Procedures, Section 2. Examples of prohibited Endowment Fund distributions include but are not limited to: support staff or minister salaries, insurance expenses, other periodic recurring expenditures (postage, IT, lawn mowing, snow removal, heat/air/water expenses, etc.). Applications made to apply Endowment Fund distributions to items that are part of the annual operating budget or support services may be rejected by the Endowment Fund Committee.
3. The Endowment Fund Committee respectfully asks that you perform due diligence to determine the estimated amount of any expenditure before requesting an Endowment Fund distribution.
4. The Endowment Fund Committee is charged with the responsibility to recommend the recipient(s) of Endowment Fund distributions to the Board of Trustees for approval. The Endowment Fund Committee hereby reserves the right to reject any application received that does not comport with the religious values of the congregation.

Church Member Name: _____

Address: _____

Phone: _____

Email: _____

Are you a member of the Second Unitarian Church of Omaha? Yes No (select one)

Part I.

Please indicate which one (or more) of the two criteria below applies to your Endowment Fund distribution request:

Criteria	Application Meets Criterion?
<u>Bylaws Article 15.3.a</u> Upkeep of the Church, including, but not limited to, maintenance of buildings, capital investments or renovations, or debt reduction.	<input type="checkbox"/> Yes <input type="checkbox"/> No (select one) (If yes, complete Part II. below)
<u>Bylaws Article 15.3.b</u> Outreach into the community, including, but not limited to, grants to Church camps and conferences, theological schools, local social service agencies or institutions to which the congregation relates, and to special programs designed for those persons in our community who are in spiritual or economic need.	<input type="checkbox"/> Yes <input type="checkbox"/> No (select one) (If yes, complete Part II. below)

If “No” is selected for both of the two criteria above, then your Endowment Fund request will not be considered.

Part II.

Please explain the details of your application and how it meets the above criteria. Include any relevant information for the Endowment Fund Committee to evaluate your application. These help us understand your goals and application further!

(If you prefer, you may submit a separate document.)

What is the total dollar amount of your requested Endowment Fund application?

(round to the nearest dollar) \$_____.

Please include an itemized list and detailed estimate for how you derived the total dollar amount reported above.

Thank you for your passion for our shared faith! We look forward to reviewing your application!

Endowment Fund Committee

Please submit completed application to: endowment@2uomaha.org.