

## **Guidelines for Charity Nominations from Headquarters Employees**

- Take a look at Trustmark's [Guidelines for Giving](#). These are the points the Trustmark Foundation uses to filter organizations and help determine the company's level of giving.
- Review the [list of local organizations](#) the Trustmark Foundation already supports. We want to reach out to new and worthy charities.
- Make sure your nominee is an IRS-designated 501(c)(3) charitable organization. The easiest way to do this is to call or check the organization's website.
- Some examples of types of organizations you are encouraged to nominate:
  - Organizations focused on providing social services to improve the lives and well-being of disadvantaged people in local areas where our employees live and work;
  - Cultural institutions that provide educational or social enrichment services to the community, with a meaningful investment in programming and outreach tailored to underserved areas and populations;
  - Organizations that invest in research and advocacy programs to treat and combat disease, and improve health;
  - Organizations to which you and your fellow employees donate time and/or money.
- Types of organizations that will not be considered:
  - Religious, political or fraternal organizations and technical or professional associations, though charities, such as shelters or food pantries, supported by religious or fraternal organizations will be considered;
  - School- or PTA-sponsored clubs, trips or events;
  - Sports teams or youth clubs;
  - Charities that are not yet well established in the community or are not yet distributing a majority of donations to support the organization's primary mission.
- The following information is required:
  - Proof of 501(c)(3) status;
  - Description of the organization (primary mission, services provided, population served etc.);
  - Reason for selection (and why this charity would be meaningful to other Trustmark employees);
  - Whether the organization is a charitable foundation (The Trustmark Foundation cannot donate to some types of foundations).
- Trustmark is donating a total of \$35,000 to charities nominated by Lake Forest/Bradley employees. This will be split between at least two charities, with a minimum donation to any single charity of \$5,000.



The Trustmark Foundation  
Branch Office Contribution Request Form 2010

Requesting Individual: \_\_\_\_\_ Ext. \_\_\_\_\_

**Organization Information** (all fields are required unless otherwise noted)

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Federal Tax ID: \_\_\_\_\_

Inception Date: \_\_\_\_\_

Website Address (if known): \_\_\_\_\_

Phone Number (if known): \_\_\_\_\_

Type of Organization (please check one, **only if known**):

- Public Charity
- Private Foundation
- Private Operating Foundation

Description of Organization: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Services Provided: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Population & Area Served: \_\_\_\_\_  
\_\_\_\_\_

Reason for Selection: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please identify your relationship to the organization and to any Employee or Board Member of the organization: \_\_\_\_\_  
\_\_\_\_\_

*Proof of 501(c)(3) status must be attached.*

## Guiding Principles of Giving

The Trustmark Foundation follows five guiding principles to determine the direction and level of corporate giving. This ensures that Foundation gifts have a direct, positive impact and are meaningful to Trustmark, its employees, and to the communities in which employees live and work.

***I. Does the organization play a distinct role in fulfilling a critical need in the community?***

When considering funding requests, the Foundation Committee weighs the need the organization addresses in the community as well as the unique benefits the organization provides. Other things being equal, if the organization is the only agency providing a critical service to the community, it will receive higher consideration than an agency that offers services duplicated by other organizations.

***II. What is the level of employee commitment to the organization?***

The Trustmark Foundation supports employee giving, volunteerism and community involvement. As part of this aspect of its mission, the Foundation gives consideration to charitable organizations through which Trustmark employees serve the community or participate in activities beneficial to the community.

***III. How vital is Trustmark's contribution to the success of the organization's primary mission?***

To help perpetuate healthy, stable communities, and to ensure that contributions have a significant positive impact, Trustmark may assign priority to organizations based on two factors: (1) the extent to which contributions support the primary mission of the organization; and, (2) the importance of Trustmark's contributions relative to those of other donors.

***IV. Does Trustmark's contribution or participation reinforce its place in the community as a responsible corporate citizen?***

Trustmark, as an employer, as a neighbor, and as a contributor to worthy causes through its employees and the Foundation, is a visible part of many communities. These fundamental ties are crucial for the success of Trustmark and for the vitality of the communities it serves. For that reason, consideration will be given in situations that enhance Trustmark's position as a positive and integral part of a community.

***V. Is the mission of the organization related to Trustmark's businesses?***

As a company that helps employers and individuals mitigate medical and financial risk, Trustmark supports programs designed to improve health and wellness. While this includes organizations or initiatives that promote health education and invest in medical research, specific attention will be paid to community-based organizations that deliver necessary healthcare services to those who could not otherwise afford it.