

Bank of America Private Bank Philanthropic Solutions Grantmaking Procedures – Florida Office

I. INTRODUCTION

Bank of America, N.A. serves as trustee, co-trustee or agent to numerous private foundations. In the Florida office, Bank of America Private Bank serves as a co-trustee and shares grantmaking decision authority with co-trustees for two separate foundations – the Bank of America Client Foundation, and the William and Helen Thomas Charitable Trust.

We have prepared these grantmaking guidelines as a tool to help the nonprofit community better understand the grantmaking goals and grant application process for these foundations.

II. PHILANTHROPIC GOALS

Program Focus Areas

The **Bank of America Client Foundation** supports the Sarasota, FL area through grants to organizations with successful track records in:

- Arts
- Historic preservation
- Education
- Human Services

From time to time, the trustees may consider grants in Delaware. *Please see page 4 for more details on the Bank of America Client Foundation's guidelines.*

The **William and Helen Thomas Charitable Trust** supports:

- Educational opportunities for deserving and needy students
- Preservation and protection of the natural environment
- Medical research and care for the treatment, prevention and cure of arthritis, blindness and diabetes
- Assistance for the poor, especially those of Appalachia and those of American Indian ancestry
- Assistance and care for orphaned children who are unlikely to be adopted because of age, handicap, or for other reasons

Please see page 5 for more details on the Thomas Charitable Trust's specific guidelines.

Type of Support

Both the Bank of America Client Foundation and the William and Helen Thomas Charitable Trust generally provide one-year grants, and prioritize making program- or project-related grants. See their respective guidelines for greater detail.

III. APPLICATION PROCEDURES

The Florida office currently manages 2 discretionary foundations. The first step in the application process

is to determine if there is a match in your organization's work with the funding parameters of the relevant foundation.

Before You Apply

Before you start the application process, we recommend that you thoroughly research the information provided at www.bankofamerica.com/grantmaking. The website provides detailed information about the Friends Foundation. Specifically, we strongly recommend that you thoroughly read the **Foundation Overview** page, which is a 1-page summary on the foundation, and the **Frequently Asked Questions** (FAQ) tab which provides helpful overview information.

After exploring our website, you should be able to determine:

1. If your organization in fact meets the geographic and/or programmatic parameters of the foundation.
2. The proposal deadline of the foundation, ensuring that your proposal is submitted at the appropriate time of the year.

Grantee Lists

You may review each foundation's most recent list of grantees in the 'Grant History' section of each **foundation detail** page. The interactive *Foundation Maps* tool is part of Candid-The Foundation Center's eGrant Reporting Program. To learn more about navigating the Maps, visit Candid-The Foundation Center's tour of *Foundation Maps*. (<https://maps.foundationcenter.org/tour.php>)

Submitting an Application

Applications must be submitted online through our website: www.bankofamerica.com/grantmaking to access the 'Apply Now' link and review the Online Application Help document. Any applications submitted in paper format or via any other method will be summarily declined without a review.

Please submit online applications by 11:59 p.m. on the day of the foundation's deadline date. If the application deadline date falls on a weekend or a federally recognized holiday, we do not extend the deadline, therefore applications must be submitted on the prior business day by 11:59 p.m.

Online grant applications will be accepted 24-hours a day, 7 days a week, generally on, or prior to the proposal due date. However, applicant inquiries can only be answered during normal business hours, Monday through Friday, 9 a.m. – 5 p.m. PT. Please be advised that technical support is **NOT** provided on weekends for password resets or general technical inquiries. Therefore it is best to start your application early, seek technical support during business hours, and to submit your application in advance of the due date.

Post Grant Reporting

A grant report is required within 1 year of the grant application date, regardless of whether all of the funds have been spent. You will be ineligible for future grant funding if this report is not received within a year of the grant award. Organizations receiving a multi-year award are required to submit reports annually until the end of the grant term.

Online grant report forms for approved requests submitted online, will be published in your [MyAccount](#) portal in the Requirement tab. If the online grant report form is not yet visible, please let us know via email fl.grantmaking@bofa.com, and we will publish an online form to your account.

IV. LIST OF FOUNDATIONS

Below is a list of the foundations managed by the Georgia office with geographic and program focus areas, corresponding application deadlines, and decision dates. See the individual **foundation detail** pages for more information. www.bankofamerica.com/grantmaking

Foundation Name	Geographic Focus of Foundation	Program Type	Application Deadline	Decision Date
The William and Helen Thomas Charitable Trust	FL	Education Environment Human Services Medical Research Medical Care	Sep 15	1-2 months after deadline
Bank of America Client Foundation	FL, DE	Human Services	Apr 15; Sep 15	1-2 months after deadline

V. CONTACTS

Please feel free to email or call us to discuss your grant request before preparing a formal proposal.

Name

Email Address

Andrew Davis, SVP, Private Client Manager

andrew.g.davis@bofa.com

Tony Sangio, Officer; Philanthropic Administrator

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Bank of America Client Foundation Guidelines

Background

In 1961, Sarasota, Florida, Bank and Trust Company (now Bank of America) formed the Bank of America Client Foundation to support charitable endeavors in the local area. The Foundation is set up with funds from several donors with varying interests. The Foundation typically makes grants to local Sarasota organizations with a successful track record.

Funding priorities

Support is given to arts, historic preservation, education, and human service organizations. The Foundation limits its funding to organizations working in Sarasota County, FL, and within the state of Delaware.

Grants typically range from \$5,000 to \$40,000, and the average grant size is approximately \$20,000.

Funding restrictions

The Foundation does not make grants to individuals. In addition, the Foundation generally does not provide funding for: general operating expenses; endowment or annual giving campaigns; debt reduction or financing; conferences, seminars, workshops, travel, surveys or advertising; individual schools; or child care facilities.

William and Helen Thomas Charitable Trust Guidelines

Background

The William and Helen Thomas Charitable Trust honors a long-time philanthropic couple from Stuart, Florida by supporting nonprofit organizations providing services for education, the environment, medical needs, the underprivileged and other charitable purposes. Grants are primarily made in Palm Beach, Martin and St. Lucie Counties in FL; however, requests are also entertained from the Appalachian region of the U.S., and other locations in Florida and the U.S. as determined by the trustees.

The William and Helen Thomas Charitable Trust was created to maintain William and Helen Thomas' commitment to philanthropy and giving back to the community. Prior to his death in 2001, William Thomas was a salesman for ARCO Company and served as Board Chairman of Enabling Technologies. William Thomas was also a proponent of providing services for the blind. Helen Thomas worked as a nurse and was a staunch supporter of medical education.

Funding Priorities

- Educational opportunities for deserving and needy students
- Preservation and protection of the natural environment
- Medical research and care for the treatment, prevention and cure of arthritis, blindness and diabetes
- Assistance for the poor, especially those of Appalachia and those of American Indian ancestry
- Assistance and care for orphaned children who are unlikely to be adopted because of age, handicap, or for other reasons.

The Trust first prioritizes efforts in the Palm Beach, Martin, and St. Lucie Counties of Florida; followed by the Appalachia region and then extends to national reach at the discretion of the Trustees. If you have any questions about your potential eligibility to apply, please contact the person listed in the contact section of these procedures.

On average, the trust makes approximately 60-65 grants per year that range in size from \$5,000 to \$50,000. The average grant is approximately \$18,000.

Notification

Applicants will be notified via email of the acceptance or rejection of their request generally within three months of the application deadline.