



Philanthropy southwest

Connecting Grantmakers. Inspiring Excellence.

2015 Membership Application

Organization name: _____

Address: _____

City, state, zip code: _____

Telephone number: _____ Fax number: _____

E-mail address: _____ Website address: _____

Contact person: _____ Title: _____

Program Focus: _____

Year established: _____ Year IRS classification received: _____

Form 990 or 990PF attached? Yes _____ No _____ Year _____

Principal activities: _____

Type of foundation/organization (please check all that apply):

Private Corporate Community Operating* Other

* Is operating foundation primarily funded by its own endowment? Yes No

* Does the foundation engage in fundraising for its own benefit? Yes No

Where is your active giving (please check all that apply)?

AZ AR CO NM NV OK TX

Area(s) served: Local State National International

Source(s) of the organization's funds: _____

Assets as of last fiscal year

Fiscal Year Ending	Assets (\$)	Grants (\$)
_____	_____	_____

Is there any pending or anticipated legal or regulatory action against the organization? Yes No

If yes, please describe on a separate sheet of paper.

Please attach a list of the organization's officers, trustees, and staff.

Membership in Philanthropy Southwest was suggested by:

Name: _____ Organization: _____

Phone number: _____ e-mail (if available): _____

I certify that the above-listed organization operates in compliance with all applicable local, state and federal laws and regulations. I agree that representatives of this organization will not use their Philanthropy Southwest membership as a vehicle for solicitation of other Philanthropy Southwest members.

AUTHORIZED REPRESENTATIVE'S NAME: _____

TITLE: _____ DATE: _____

(OVER)

Applicants for membership must submit the following as part of the application process:

1. Completed application form
 2. Current IRS determination letter
 3. Most recent IRS Form 990 or 990-PF, including all schedules
 4. A current listing of board members
- If your foundation has not yet filed a 990 or 990 PF, but has begun making grants, a statement detailing grant activity will suffice.
 - Provisional membership status is available for foundations that would otherwise be eligible to join Philanthropy Southwest but have not yet begun making grants. Upon approval, provisional membership will be restricted to one-year from the application date at the dues rate of \$350.

The dues structure is as follows:

RANGE OF AVERAGE ANNUAL QUALIFYING DISTRIBUTIONS:	ANNUAL DUES:
Less than \$250,000	\$350.00
\$250,000 to \$499,000	\$500.00
\$500,000 to \$1 million	\$1,000.00
\$1 million to \$2 million	\$1,500.00
\$2 million to \$4 million	\$2,000.00
\$4 million to \$6 million	\$3,000.00
\$6 million to \$10 million	\$3,500.00
\$10 million to \$20 million	\$4,000.00
More than \$20 million	\$5,000.00

Return Application for Membership to:



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Philanthropy Southwest
624 North Good Latimer Expressway, Suite 100
Dallas, Texas 75204

Telephone: 214.740.1787
Fax: 214.740.1790

Web: www.philanthropysouthwest.org
E-mail: Lucille@philanthropysouthwest.org or
Amy@philanthropysouthwest.org

Lucille DiDomenico, *Executive Director*
Pam Fellows Jamieson, *Program Manager*
Adrienne Clay, *Office Manager/Database Administrator*
Amy J. Askari, *Project Coordinator*