



Philanthropy southwest

Connected, Impactful Philanthropy

2020 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/organization primarily funded by its own endowment?

Yes No

* Does the foundation/organization engage in fundraising for its own benefit?

Yes No

Please list state(s) in which the foundation/organization is giving:

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 referred 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.

The dues structure is as follows:

RANGE OF AVERAGE ANNUAL QUALIFYING DISTRIBUTIONS:	ANNUAL DUES:
Less than \$250,000	\$450.00
\$250,000 to \$499,999	\$600.00
\$500,000 to \$1 million	\$1,150.00
\$1 million to \$2 million	\$1,700.00
\$2 million to \$4 million	\$2,300.00
\$4 million to \$6 million	\$3,500.00
\$6 million to \$10 million	\$4,250.00
\$10 million to \$20 million	\$5,000.00
\$20 million to \$50 million	\$6,000.00
More than \$50 million	\$7,500.00

Return Application for Membership to:



Philanthropy Southwest
1910 Pacific Avenue, Suite 13500
Dallas, Texas 75201

Telephone: 214.740.1787
Fax: 214.740.1790
Web: www.philanthropysouthwest.org
E-mail: lauren@philanthropysouthwest.org

Staff:

Tony J. Fundaro, *President & CEO*
Lauren Haskins, *Vice President of Membership & Partnerships*
Amanda Arizola, *Vice President of Finance & Operations*
Hillary Evans, *Vice President of Professional Learning & Public Policy*
Amanda June McLachlan, *Manager of Marketing & Events*
Rachel Mewborn, *Program Associate*