



# Philanthropy southwest

*Connected, Impactful Philanthropy*

## 2023 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)

# Private, Community and Operating Memberships

---

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 private, community and operating dues structure are as follows:

<b>RANGE OF AVERAGE ANNUAL QUALIFYING DISTRIBUTIONS:</b>	<b>ANNUAL DUES:</b>
\$ 0 to \$ 100,000	\$ 495
\$ 100,001 to \$ 250,000	\$ 545
\$ 250,001 to \$ 500,000	\$ 675
\$ 500,001 to \$ 750,000	\$ 1,265
\$ 750,001 to \$ 1 million	\$ 1,395
\$ 1 million to \$ 2 million	\$ 1,875
\$ 2 million to \$ 3 million	\$ 2,535
\$ 3 million to \$ 5 million	\$ 2,785
\$ 5 million to \$7.5 million	\$ 3,850
\$ 7.5 million to \$10 million	\$ 4,695
\$ 10 million to \$15 million	\$ 5,500
\$ 15 million to \$20 million	\$ 6,050
\$ 20 million to \$30 million	\$ 6,600
\$ 30 million to \$50 million	\$ 7,260
\$ 50 million to \$75 million	\$ 8,250
\$ 75 million and above	\$ 9,075

*\* Community Foundations may choose whether or not to include "pass through" funds when calculating the three year average of a community foundation's disbursements. "Pass through" funds are defined as funds which reside with the foundation for less than one year or are not reflected in the fair market value of the community foundation's assets at year end.*

---

## Corporate Memberships

Corporate foundations, corporate giving programs, and financial professionals serving as trustees and advisors of charitable trusts and foundations are eligible for corporate membership in Philanthropy Southwest.

Eligibility requires a minimum of \$25,000 in annual giving distributed within the Southwestern United States (Arkansas, Arizona, Colorado, Nevada, New Mexico, Oklahoma and Texas).

Applicants for corporate membership are asked to include the following as part of the application process:

- A description of your grantmaking
- A list of grantees
- Current IRS determination letter (if applicable)
- Most recent IRS Form 990 or 990 PF including all schedules (if applicable)
- Current list of board members (if applicable)

---

The corporate dues structure is as follows:

Member dues are determined by the organization's number of employees who office in the Philanthropy Southwest region. The Philanthropy Southwest region is defined by the following seven states: Arkansas, Arizona, Colorado, Nevada, New Mexico, Oklahoma and Texas.

<b>NUMBER OF REGIONAL EMPLOYEES:</b>	<b>2023 MEMBERSHIP LEVEL:</b>
3,500 +	\$8,250
500 – 3,500	\$5,500
100 – 499	\$2,750
1 – 99	\$1,650

---

Return Application for Membership to:



Philanthropy Southwest

3000 Pegasus Park Drive, Suite 706  
Dallas, Texas 75247

Telephone: 214-740-1787 Fax: 214-740-1790

Web: [www.philanthropysouthwest.org](http://www.philanthropysouthwest.org)

E-mail: [mallory@philanthropysouthwest.org](mailto:mallory@philanthropysouthwest.org)