



## PROJECT SUMMARY - HEARTS AND HANDS PROGRAM

RETURN WITHIN 30 DAYS OF THE EVENT TO THE OUTREACH AND ENGAGEMENT DEPT. FOR REIMBURSEMENT APPROVAL.

Court / Impact Team Name and No: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Project Name: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Sole Sponsor (had MAJOR decision making responsibility)     Co-Sponsored (assisted others)

### 1) Event Sign In / Media Release:

**Minimum 5 to qualify.** Please have your members and volunteers sign in for the event and initial the boxes below to acknowledge their media release; parent please initial for child. I grant permission to 1891 Financial Life to use my image (photographs and/or video) for use in 1891 Financial Life publications, website, social media, and/or YouTube. If you need more space, use a separate sheet of paper.

Total Number of Attendees at the Event: \_\_\_\_\_

NAME	MEMBER?	MEDIA RELEASE

NAME	MEMBER?	MEDIA RELEASE

### 2) Share Your Success: Send Photos and Video!

Printed photos of the event mailed with form, or  Digital items emailed to [outreach@1891FinancialLife.com](mailto:outreach@1891FinancialLife.com)

Tell us about highlights, special guests, reactions, etc.: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

### 3) Matching Funds: The Check Information

The matching funds check cannot be payable to your Court / Impact Team; it can be payable to any parish or community organization. If the event is to assist an individual or family, the check must be made payable to a bank trust (or similar account) on their behalf.

Check should be made payable to: \_\_\_\_\_

Address / Apt. No: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

**Check will be mailed to Court / Impact Team officer for presentation:**

Officer Name: \_\_\_\_\_ Position: \_\_\_\_\_

Address / Apt. No: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

**4) Original Paperwork**

**FINANCE SUMMARY**

Income: Hearts and Hands project.....\$ \_\_\_\_\_

Total in cash donations .....\$ \_\_\_\_\_

TOTAL PROCEEDS .....\$ \_\_\_\_\_

This amount is to be deposited into Court / Impact Team's bank. Attach **original** bank deposit.

List project expenses to be deducted from proceeds. Include **original** receipts for expenses.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Subtract project expenses .....\$ - \_\_\_\_\_

NET PROCEEDS .....\$ \_\_\_\_\_

**SUMMARY CHECKLIST**

Please make sure you have completed the following requirements prior to submitting your summary to ensure proper funding.

- Minimum 5 members have signed in
- Bulletin ad or other printed promotion is attached
- Proper expense receipts are attached
- Proper bank deposit slip is attached (required)
- Proof of funds received for a co-sponsored event.** EX: a thank you letter from the recipient on their letterhead; the \$ amount received is mentioned in the letter.
- Photos of the event are included or emailed to: **outreach@1891FinancialLife.com**

**ENTIRE PROCEEDS MUST BE DONATED TO THE RECIPIENT**

**5) Your Court / Impact Team's Verification**

- 1) Please attach publicity and verification of your project. These may include newspaper articles, parish bulletins or a letter of acknowledgement from the recipient(s).
- 2) Don't forget Step 2: Share Your Success! Send a picture\* of the event or check presentation – may be used in the 1891 Financial Life magazine, website, press release, or social media coverage.

**ONE OFFICER SIGNATURE REQUIRED:**

\_\_\_\_\_  
POSITION PRINT NAME SIGNATURE

\_\_\_\_\_  
EMAIL PHONE DATE

**PLEASE SUBMIT THIS FORM TO:** 1891 Financial Life Outreach and Engagement, 200 N. Martingale Rd., Ste. 405, Schaumburg, IL 60173 • FAX: (847) 342-4556 • Email: outreach@1891FinancialLife.com

**HOME OFFICE USE:** App No: # \_\_\_\_\_ Approval given by: \_\_\_\_\_ Date: \_\_\_\_\_

Sole Sponsored  Co-Sponsored Voucher Date: \_\_\_\_\_

Matched to Date: \$ \_\_\_\_\_ Amount of matching check: \$ \_\_\_\_\_ Available Balance: \$ \_\_\_\_\_

Project Summary Denied by: \_\_\_\_\_ Date: \_\_\_\_\_

Reason: \_\_\_\_\_