

INVESTMENT COMPANY INSTITUTE EDUCATION FOUNDATION MICROGRANTS FOR INVESTOR EDUCATION INNOVATION WITHIN METROPOLITAN WASHINGTON, DC

(Please review the [grant guidelines and eligibility requirements](#) before completing this form.)

APPLICATION FORM

1. Principal Contact (the person primarily responsible for conducting the investor education project, if funding is approved, on behalf of the school or other nonprofit organization):

NAME:

TITLE:

ORGANIZATION:

ADDRESS:

TELEPHONE:

EMAIL:

WEBSITE OF ORGANIZATION:

ORGANIZATION'S EIN:

2. In no more than 1,000 words (not including the budget), please briefly describe the proposed project on a separate page(s) attached to this form. Include the following information, using this outline format:

- In one or two sentences, please summarize how you will use the grant.
- What is the organization's experience in providing financial education?
- Who will provide the investor education?
- What educational content/materials will be used?
- Who is the primary audience?
- How and where will the education be delivered?
- How many people do you expect to reach? Over what period of time?
- What is new, different, or innovative about your project?
- How will you evaluate the project's effectiveness in building knowledge, skills, and confidence?
- How much funding are you requesting and how will it be used? Please provide a detailed, line-item budget. Explain how you estimated the cost of each item.

3. If there is any other information you feel is relevant to your proposed project, please note it here:

4. I certify that:

- all information provided for this grant application is complete and accurate to the best of my knowledge,
- any funds granted by ICIEF will be used for the purposes described in this application,
- ICIEF will be recognized as the sponsor or underwriter of the project in presentations and/or materials (to be determined when funding is awarded),
- if approved for funding, I will submit to ICIEF, within two weeks of the completion of the project, the following information:
 - a) an accounting of how the grant money was used, with receipts attached, and
 - b) a completed ICIEF [evaluation form](#)

SIGNATURE:

PRINT NAME:

DATE:

Please send the completed application form by email to duncan@ici.org or by mail to:

Sue Duncan, Vice President
Investment Company Institute Education Foundation
1401 H Street, NW, Suite 1200
Washington, DC 20005

PLEASE NOTE:

Those applying on behalf of a 501(c)(3) organization must also submit, with the application form, a copy of the current Internal Revenue Service determination letter confirming the organization's tax exemption.

Thank you for your application.