

## Christian Science Society of Boonville Irrevocable Trust

### Background on the Trust:

When the Christian Science Church in Boonville, Indiana disbanded in 1994, a trust was established in order to carry on the church's values and help support the Warrick County community. Peoples Trust and Savings Bank was appointed the Trustee of the Christian Science Society of Boonville Irrevocable Trust, to be administered by its Trust Department, for the following purposes:

“ Trustee shall distribute all or part of the net income of the trust on a not less than annual basis to not-for-profit charitable, civic, educational or community organizations in Warrick County or which serve Warrick County Residents for non-denominational, non-medical Christian purposes, including those that administer to the needs of those less fortunate in Warrick County. The Trustee, in the Trustee's sole discretion, shall determine which organizations would receive the distributions of net income of the Trust Property, and the pro-rata share of each beneficiary. All such organizations to which distributions may be made shall be of the type described in Sections 170(c), 2055(a) and 2522(a) of the Internal Revenue Code of 1986.”

Solicitations are accepted at any time, up to and including September 15<sup>th</sup> of each year. Any solicitations received after that date will be kept on file and considered for the following year's distribution.

The Trust Committee meets in October to review the requests and determine the recipients of donations. The distribution presentation is held in November.

To solicit funds from this trust, please send the following documentation to the Trust Department of Peoples Trust and Savings Bank, as Trustee of the Christian Science Society of Boonville Irrevocable Trust:

1. The enclosed check list, completed with your organization's information.
2. A copy of the tax exempt status of the organization with accompanying certification by the officers and/or directors of the organization that the tax exempt status remains in effect.
3. A current listing of the officers and directors of the organization.
4. A copy of your organization's budget, reflecting sources of income and break-down of expenses.
5. A formal letter of solicitation outlining the following information:  
State how your organization serves Warrick County residents  
Dollar amount requested  
Purpose of the request  
If the request is to fund a project or a purchase, please include copies of estimates to support your request.

**Christian Science Society of Boonville Irrevocable Trust**

**Solicitation Checklist and Summary Page**

**Please submit the completed application with your cover letter and supporting documentation to the following address no later than September 15<sup>th</sup> in order to be considered for the fall distribution:**

**Trust Department  
Peoples Trust and Savings Bank  
132 S. Third Street  
P.O. Box 307  
Boonville, Indiana 47601**

**ORGANIZATION INFORMATION:**

Name as stated on IRS tax determination letter: \_\_\_\_\_  
Name of Organization (if different from above): \_\_\_\_\_  
Street Address: \_\_\_\_\_  
\_\_\_\_\_

Contact: Name \_\_\_\_\_  
Title/Position \_\_\_\_\_  
Phone Number \_\_\_\_\_

**SUMMARIZE THE MISSION/PURPOSE OF YOUR ORGANIZATION:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**REQUEST FOR FUNDING INFORMATION:**

Dollar Amount Requested: \$ \_\_\_\_\_ Date of Request: \_\_\_\_\_  
Brief Purpose of Request: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

.....  
**FOR TRUST COMMITTEE EVALUATION USE:** Date Received: \_\_\_\_\_

- Complete Application     Tax exempt in effect     Approve/Amount \_\_\_\_\_  
 Letter of Solicitation     Supporting Documentation     Deny