



KOVITZ CARES FOUNDATION

WHO WE ARE

Kovitz Cares Foundation was established in 2020 by employees of Kovitz seeking to make a difference in the communities in which they live. Through two key initiatives, organizing employee group volunteer projects and raising needed funds by hosting charitable events, Kovitz Cares strives to reach those most in need.

OUR CHARITABLE GIVING PROCESS

Kovitz Cares will award three individual \$5,000 grants to eligible organizations that serve our local communities. Our giving process is designed to drive engagement among employees. Initial due diligence is performed by the Foundation's Philanthropic Giving Committee, and three organizations are selected as grant recipients and invited to present to our employees. Based on those presentations, employees will vote and select one grant recipient to serve as the primary beneficiary at the Kovitz Care's annual fundraiser event, with the intention being that the primary beneficiary will receive additional funds raised at the event.

2022-2023

GRANT TIMELINE

OCTOBER 17, 2022

Applications Open

NOVEMBER 18, 2022

Applications Due

DECEMBER 16, 2022

Top 3 Notified

JANUARY 2023

Top 3 Present

FEBRUARY 2023

Primary Beneficiary
Selected

MAY 19, 2023

Annual Fundraiser Event



**KOVITZ
CARES**

WWW.KOVITZCARES.ORG

71 S WACKER DRIVE
SUITE 1860
CHICAGO, IL 60606

312.334.7300

KOVITZ CARES GRANT APPLICATION

INTERESTED IN BEING CONSIDERED?

If your organization's focus and the needs of those whom you serve match the goals, focus and mission of Kovitz Cares, please complete the application within.

OUR MISSION

Kovitz Cares seeks to raise much-needed funds to assist local charities in helping the people of our local communities who are in need the most – in need of food, in need of shelter, in need of education, in need of a cure, in need!

WHO WE SERVE AND HOW

Among other endeavors, we exist to distribute much-needed funds to local charities who are serving the neediest residents of the communities in which we live and work. Kovitz Cares raises funds through hosted events, which then fund several goals. One goal is to deliver small grants to local charities through this application process. For the 2022-2023 giving year, Kovitz Cares plans to distribute a minimum of three \$5,000 grants to three eligible organizations.

QUALIFICATION CRITERIA

Please apply if your organization meets the following criteria:

- ♥ 501(c)(3) charity
- ♥ Serve a local community (i.e., not a national or international charity)
- ♥ No religious or political affiliation
- ♥ Referred by an active Kovitz employee
- ♥ Cooperate with due diligence requests
- ♥ Offer volunteer opportunities to Kovitz employees
- ♥ Been in operation for at least three fiscal years

QUESTIONS?

Please email any application-related questions to KovitzCares@kovitz.com.



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KOVITZ CARES 2022-2023 GRANT APPLICATION

Name of Applicant Organization

Street Address

City

State

Zip Code

Phone

Website URL

Annual Budget

501(c)(3) Status (Y/N)

Number of Years Active

Name, Role at Applicant Organization, and Email of Person Completing Form

Name and Affiliation with Applicant Organization of Kovitz Employee Referral

Mission Statement

Description of Organization

Description of People/Communities the Organization Serves

Intended Use of Grant Funds

Description of 1-2 Potential Group Volunteer Opportunities for Kovitz Employees