



## 2017 Invest in Others Awards Corporate Philanthropy Award Nominations

Nominations for the Corporate Philanthropy Award in two categories (Advisory Firms and Financial Institutions) are accepted through the same system as advisor nominations. Only a representative of the company can submit a nomination. **The deadline is April 19, 2017.**

### Eligibility:

Advisory Firms: U.S.-based RIAs/client facing firms.

Financial Institutions: U.S.-based financial services companies are eligible as well as ancillary companies that serve the financial advice/wealth management industry. This includes but is not limited to broker-dealers, wirehouses, custodians and clearing firms, insurance companies, asset managers, investment management firms, banks, accounting firms, and technology companies.

### Be prepared to answer the following questions:

1. Please help us determine your employee participation rate in your corporate philanthropy programs.
  - a. Please provide the total number of corporate employees who work for your company. Include both full-time and part-time employees.
  - b. How many of your corporate employees participate in at least one of the philanthropic programs offered by your company? Participation in a matching gift program does NOT count.
  - c. Please calculate your participation rate by dividing the number of corporate employees who participate over the total number of corporate employees ( $1b \div 1a$ ).
2. Please help us determine the average number of volunteer hours each of your corporate employees spent volunteering in company philanthropic programs in 2016.
  - a. Please provide the total number of volunteer hours your corporate employees completed in 2016 in philanthropic programs offered by your company.
  - b. Please calculate the average hours per employee by dividing the total number of volunteer hours over the number of corporate employees who participate ( $2a \div 1b$ ).
3. Does your company offer a matching gift program? (Yes/No)
  - a. If yes:
    - i. Maximum dollar amount matched per year
    - ii. Percentage of corporate employees who participated in your matching gift program in 2016
    - iii. Please describe program criteria
4. Does your company offer volunteer time off (VTO)? (Yes/No)
  - a. If yes:
    - i. Number of volunteer time off (VTO) hours offered to employees per year
    - ii. Percentage of corporate employees who utilized volunteer time off (VTO) in 2016
    - iii. Please describe program criteria
5. Describe ONE specific project or campaign that your company and its employees were most proud to support in 2016. Please elaborate on the project or campaign and the positive impact it had on employees and the community.
6. List the philanthropic programs your company offered in 2016. Please indicate whether the program was new and if it is ongoing (annually, monthly, weekly) or one-time only.
7. Do you have a dedicated staff member to run your corporate philanthropy programs? Please explain.
8. How would you describe your corporate culture and the role philanthropy plays in your company?

You will also be asked to provide your company logo and 3-5 compelling, meaningful photos that support your nomination. They should feature employees in action giving back.

All nominations **MUST** be submitted through the Online Nominations Portal found at [investinothers.org/nominate](http://investinothers.org/nominate) by April 19<sup>th</sup>.  
If you have additional questions, please email [info@investinothers.org](mailto:info@investinothers.org) or call (781) 304-4812.