



LUSO-AMERICAN FINANCIAL

A Fraternal Benefit Society

“MATCHING FUNDS” PROGRAM GUIDELINES

As a fraternal benefit society we encourage our membership, through their local Councils and Lodges, to gather together and participate in charitable (non-profit) projects that will benefit not only our own Society, but more importantly others in the community as well.

In the past, our members have joined in fundraising events such as: walk-a-thons, bake sales, dinners, carnivals, picnics, donations to Red Cross relief efforts, Join Hands Day and many other philanthropic events to raise funds and give support for numerous projects in their respective communities. The purpose of the Luso-American Financial Matching Funds Program is to get members together to actively participate in a particular fund raising project to benefit the communities they live and serve in.

Luso-American Financial will match funds dollar for dollar **up to a maximum of \$500 dollars per Council or Lodge per year**. Each Council or Lodge is allowed to use the matching funds program up to a maximum of 5 events per year to reach the \$500 maximum per year.

For example, if your Council or Lodge donates \$100.00 to the Muscular Dystrophy Association and the appropriate Matching Funds Request Form has been submitted to the Home Office, Luso-American Financial will “match” that \$100.00 donation.

In order to qualify for the Luso-American Matching Funds program, you must submit the attached **“Matching Funds Request Form”** to the Home Office to receive the matching funds. This form must be completed by the local council/lodge with details regarding the not-for-profit charitable institution, organization or drive involved. Please allow 14 days for matching funds request to be processed.

Once check has been issued, please submit to charity immediately – **checks must clear within 90 days**.

If you have any further questions, please feel free to contact the Home Office at 925.828.4884 or 877.525.5876.



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“MATCHING FUNDS” REQUEST FORM

Council/Lodge # and Area: _____ has conducted its fundraising event/project for the

benefit of (charitable cause): _____ located at (address): _____

Contact Name (at charitable cause): _____ Phone # (charitable cause): _____

The contribution from our local Council/Lodge to this cause is: \$ _____

Attached is our check payable to the Charity above in this amount (or a copy of that check).

We request “Matching Funds” (up to a maximum of \$500 dollars per Council / Lodge per year) be made by the Luso-American Financial indicated below:

- Please make check payable to: _____
- Please mail the Luso-American Matching Funds check to:

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The Charity indicated above

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The address on record for Council/Lodge Officer below

Date Submitted

Printed Name of Council/President

Home Office Approval

Signature of Council/Lodge Secretary