



Together, We Can Do More.



PFCF Grant Request Application (2026)

Guidelines

The PartnersFinancial Charitable Foundation (PFCF) accepts requests for grants from PartnersFinancial member firm principals. Any principal of a PartnersFinancial member firm may request a grant, or on behalf of their firm or an individual (staff) of their firm. The grant is a 1-to-1 match. The maximum awarded amount per grant for this year is \$3,000, which represents a \$1,500 grant from the PFCF and a \$1,500 match from the principal. Each principal may submit a maximum of two grant requests in a calendar year.

Grants must be made to public charities that are 501(c)(3) organizations. Provide a copy of the organization's 501(c)(3) classification letter from the IRS with this completed application. *(Please note: The PFCF cannot donate to organizations with which applicants have conducted or intend to conduct business or with which applicants have a direct or indirect ownership interest. PFCF does not donate to lobbying organizations, political groups, religious or fraternal groups, individuals or families and private foundations.)*

Instructions to submit a grant:

Submit the grant application (form on next page) by **August 28, 2026**, to the PFCF Grants Committee c/o Carrie Meier at cmeier@nfp.com.

Questions About Grants and Submission or about the Foundation?

Contact Carrie Meier at cmeier@nfp.com or 512-944-4480.

Other Questions About PFCF?

Contact Jayson Samuels, Executive Director at jaysonsamuels@gmail.com.



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Required Information:

Firm Name: _____ Principal Name: _____

Charity Name: _____ Charity Contact Person: _____

Address (where check is to be mailed via Fedex): _____

Phone Number: _____ Email: _____

Organization (Mission/Objective): _____

Requested Grant Amount: \$ _____ Date Needed/Date of Event: _____

The PFCF Grants Committee will approve selected grants ASAP. You will be notified with details and instructions. If the grant is approved, a match of 1-to-1 by the requesting principal is required to be made directly to the PFCF, with a maximum total of \$3,000. **The match must be made within 30 days** of the grant approval or the grant will expire.

For example, if PFCF approves a total grant for \$3,000, the principal will send a grant match of \$1,500 and send those funds directly to PFCF. After receiving the principal match, the PFCF will send a check for the named charity in the amount of \$3,000 to the principal for delivery to the charity. If you prefer, we will mail the check directly to the charity as requested. You must provide the physical address, a contact name, and a phone number. **A maximum of two (2) grant requests can be made per principal.**

What will the grant be used for (if known)? _____

Will PFCF receive anything tangible or intangible in return for the grant (e.g., publication of name, tickets, etc.)? _____

To your knowledge, has the organization conducted business with NFP Insurance Services, Inc. (PartnersFinancial), Kestra Financial or any other NFP Corp. company? ___ No ___ Yes

If yes, please describe: _____

Applicant (Principal) Certification and Signature:

Please initial both lines below:

_____ Applicant has not conducted, and does not intend to conduct, business with the organization.

_____ Applicant has no direct or indirect ownership interest in the organization.

Principal Signature: _____ Printed Name: _____

Date: _____

Submit form by August 28th to Carrie Meier at cmeier@nfp.com.

Ways to Donate:

- Click on this link to donate: <https://PFCF2026.givesmart.com>
- Text: 'PFCF2026' to 76278