

HSBC Bank Bermuda Limited Donation Application Form

Contribution to communities is an important part of the HSBC approach to sustainability. The HSBC Group has a long history of supporting communities where it operates. At HSBC Bermuda, we are aligned with HSBC's global community investment strategies and are committed to supporting programmes and events in the local community.

Donations

Donations are defined as support given to registered charities or non profit organisations in Bermuda. These partnerships do not have commercial benefits, but are strictly for philanthropic purposes. HSBC's areas of focus for community investment are:

Future Skills: Providing our communities, our customers and our employees with the skills and knowledge needed to thrive in a global economy. These are broken into the below sub-pillars:

- **Employability:** A set of achievements, understandings and attributes that will make individuals more likely to gain employment and be more successful in their chosen occupations. HSBC will partner with charities, its employees and our clients to support employment related skills development.
- **Financial Capabilities:** When people have the skills, attitudes and tools needed to manage their finances they will then be empowered to make the most of their money and grow their personal economies. HSBC supports educational programmes and workshops driven by local charities to enhance financial knowledge between primary school aged children through to seniors within our local community.

Entrepreneurship: Fostering new business development by supporting charities and respective programmes which help local entrepreneurs to grow sustainable businesses within our community.

Donations should:

- Wherever possible focus on HSBC Group's key themes of Future Skills (Employability and Financial Capability programmes) and Entrepreneurship (Programmes which help small local businesses grow and thrive)
- Bring a lasting benefit to the local community
- Benefit a broad cross section of the local community
- Communicate and reinforce HSBC's commitment to the community
- Motivate staff through opportunities and direct involvement
- Have clear objectives and measurable impact

Donation support will not be provided for:

- Individuals
- Sporting events or teams
- Groups with political affiliations
- Organisations that primarily exist to develop furtherance of faith based issues
- Organisations that may pose a conflict with our corporate goals, products, employees or customers
- Organisations or initiatives whose operating model is controversial
- Capital spend, renovation or building projects
- Zoological parks for captive conservation projects
- Organisations that serve a limited membership
- The purchase of land or property
- Payments of salaries, which should not be the primary reason nor form a significant part of the donation

Please complete this Donation Application Form and provide as much details as possible regarding your request. If you require additional space for answers, you may include and send as an attachment.

All applications for donations will receive a response within 30 working days.

Please submit application form to:

HSBC Bermuda, Harbourview Centre
6 Front Street, Hamilton HM 11, Bermuda

Attention:

Clesia Pachai, Community Investment Manager
Phone: 299 6102
Email: clesia.pachai@hsbc.bm



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General Information

Organisation name:

Is your organisation a registered
Bermuda charity? Yes No

If yes, please provide your
charity number:

Contact details for the person
submitting the application

Their position within the
organisation (include their
role and responsibilities)

Organisation Address:

Telephone:

Email:

Website:

Brief history of your
organisation:



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Specific Request

Type of Donation requested:

Employability

Financial Capabilities

Entrepreneurship

Project name:

Project date(s):

Project outline:

Project objective:

How long has this project been
in existence?

What are the major
achievements of the project?



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Community Benefits

Target audience for your project:

How does your project directly benefit the local community?
Please provide respective statistics as evidence.

How will success of your project be measured?

Please provide us with details on your previous fiscal year

Year

Total Income

Total Expenditures

Donation amount requested:

Do employees of HSBC currently participate as volunteers in your organisation / project?

Please list HSBC staff names and their volunteer roles.

Yes No

Does your initiative offer the opportunity for HSBC staff involvement?

Please provide details on the potential opportunities.

Yes No

Additional Information

In addition to your completed Donation Application Form, you must also submit the following:

- A copy of your charitable certificate
- Completion of the sanctions screening form
- Project progress reports from the past 2 years
- A copy of your last 3 years of audited financials
- Supporting project budget
- A most recent list of your board of directors



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