

## **Davenport & Company LLC - Corporate Giving Guidelines**

*Davenport & Company LLC has a long history of supporting organizations and projects in the communities where our offices are located. Davenport will continue to make contributions to our communities with a preference for organizations and projects that promote education, health and human services, culture and art, environmental, and civic and community improvement.*

### **GUIDELINES**

Davenport & Company receives many sponsorship and charitable giving requests each year from wonderful organizations providing valuable services in our communities. We would like to be able to provide assistance to all of the non-profits who make our neighborhoods a better place to live and work in, however, as a mid-size employee-owned firm it is not possible to support all requests received. Each quarter a committee reviews every sponsorship request received to identify the opportunities that are the best fit for Davenport's business, our associates and our clients.

Davenport & Company LLC does not typically support organizations other than 501 (c)(3) nonprofits, governmental, or tribal entities.

Davenport does not provide support to the following:

- Capital Campaigns
- For-profit entities, including start-up businesses
- Political, labor, religious, or fraternal activities
- Individuals seeking scholarships, fellowships, or sponsors for a particular cause
- Organizations that have been operating less than two years

Factors considered when reviewing sponsorship requests:

- What life enhancing services does the charitable organization provide to our community?
- Does the sponsorship provide a marketing opportunity that will benefit the firm as a whole, a regional area in which the firm operates, or an area in which one of our branch locations operates?
- Does the sponsorship provide an entertainment opportunity for Davenport clients who are represented by Financial Advisors/Portfolio Managers/Bankers of the firm?
- Does the requesting organization have an existing relationship with the firm?
- Does the organization have a favorable rating by [Charity Navigator](#) and [GuideStar](#).

## **PROCEDURE**

Provided the requesting organization meets the guidelines laid out in this document, please submit your request using the instructions below.

1. The committee meets quarterly in the months listed below. To ensure that Davenport has time to review the request, receive full sponsorship benefits and, when applicable, have adequate time to invite event attendees please adhere to the schedule below when timing the submission of your application.

<b>Committee Meetings</b>	<b>To Review Events Taking Place In:</b>		
February	May	June	July
May	August	September	October
August	November	December	January
November	February	March	April

2. Complete the [Request for Funds](#) application. Incomplete applications will not be reviewed by the committee.
3. Submit the application *along with the complete sponsorship package* of all available opportunities to [DavenportGiving@investdavenport.com](mailto:DavenportGiving@investdavenport.com). The committee may not approve the dollar amount requested on the application, but may approve at another price point.

*Volunteer events are the responsibility of Davenport Shares. Support of volunteer events will be at the discretion of the Davenport Shares Committee and will not involve any financial commitment on the part of Davenport & Company LLC. For more information about Davenport Shares please contact [DavenportVolunteers@investdavenport.com](mailto:DavenportVolunteers@investdavenport.com).*