



**MDRT**  
**FOUNDATION**  
Financial Professionals  
Changing Lives Worldwide™

## **Worldwide Grant Program Eligibility and Award Guidelines**

Grants are awarded to organizations or programs that are non-sectarian, responsibly managed, employ appropriate fiscal accounting procedures, and are classified by their local government as a not-for-profit organization operating for charitable purposes.

All grants must be endorsed by a current member of Million Dollar Round Table (MDRT). Neither a charity nor a member of MDRT may receive a grant in two consecutive years.

The MDRT Foundation prioritizes funding projects that address a societal need or a vulnerable population over cultural or historical non-profits. Examples of recent projects funded by the MDRT Foundation:

- Programs for youth, senior citizens or at-risk groups
- Groups that provide emergency services such as food, shelter, or healthcare.
- Services for people with disabilities and mental health services (including alcohol and drug dependency programs).

Award size is typically based on the scope of the program's impact. Programs that impact one community or region typically received between USD \$1,000 -\$5,000; programs that expand throughout a nation or multiple countries typically receive USD 10,000 - \$25,000.

*The MDRT Foundation does not provide funding for any of the following:*

- Individuals
- Private charity, foundation or donor-advised fund or organizations whose primary role is re-granting funds.
- Organizations not exempt under Section 501(c)(3) of the Internal Revenue Code and not eligible for tax-deductible support (if based in the United States). If based outside the U.S., charity must be designated by a governing body to be operating for charitable purposes.
- Religious organizations or sectarian causes, unless the particular program benefits the community at large without regard to religious affiliation.
- Political causes, candidates, organizations or campaigns.
- Organizations that discriminate on the basis of age, color, citizenship, disability, disabled veteran status, gender, race, religion, national origin, marital status, sexual orientation, military service or status.
- Organizations whose primary purpose is to influence legislation.
- Colleges, universities or schools, unless the request is for a program or activity that benefits the public at-large or an at-risk group.
- Endowments or capital campaigns.
- Fundraising events (such as dinners and walkathons) or performing arts tours.
- Athletic events, fraternal groups or similar clubs.
- General academic scholarship requests.