

**ALASKA BAR FOUNDATION**  
**INTEREST ON LAWYER'S TRUST ACCOUNTS**  
**GRANT CONDITIONS AND AGREEMENT**

(GRANTEE - complete this column)

(GRANTEE - leave this column blank)

Organization:

Date:

Grant No.:

Address (mailing)

Requested Amount:

Amount of Grant:

Address (street):

Grant Distribution Date:

Telephone:

Contact Person:

Title:

Fiscal Year of Grantee:

Type of Grant:

Report Dates:

\_\_\_ Legal Services to  
\_\_\_ Disadvantaged

\_\_\_ Interim

\_\_\_ Administration of  
\_\_\_ Justice

\_\_\_ Final

Social Security Number/Tax ID Number \_\_\_\_\_  
(Grantee - provide this information only if your organization is not a 501(c)(3) organization or a governmental agency.)

Grantee agrees that the funds provided pursuant to this grant may be disbursed only in accordance with the following conditions and restrictions:

1. Grant period is July 1 through June 30.
2. Grantee will notify the Foundation as soon as possible, but not later than thirty (30) days, after any material changes occurring in the grantee's program or organization, during the period for which this grant is made. Examples of organizational changes include, but are not limited to:
  - (a) change of contact person, telephone number, or office location;
  - (b) questions raised in any financial or operational audit conducted in-house, by an independent organization or by any governmental agency, such as the IRS or similar state agency.
3. All grant funds will be used for, and only for, the public, charitable purposes specified in the grantee's application for funds, and no portion of the grant funds, including any interest earned thereon, will be used for any other purpose without prior written approval of the Foundation.
4. Any funds not expended or committed for the purposes of the grant within the period stated above will be returned to the Foundation.
5. Grantee will furnish an interim, written report to the Foundation on or before November 15 of the year of the grant, and a final, written report to the Foundation at the end of the grant period, setting forth the manner in which the grant funds were disbursed and the progress made in accomplishing the grant's purposes. The reports will include a narrative account of what was specifically accomplished by the disbursement of funds. The final report will be submitted to the Foundation on or before September 1 following the grant period. Extensions may be approved in writing by the President of the Foundation for good cause only.
6. Although IOLTA grant funds need not be physically segregated, such funds will be shown separately in grantee's financial books for ease of reference and verification. Records of receipts and disbursements under the grant, as well as copies of reports submitted to the Foundation, will be

retained by the grantee for at least four (4) years following completion of the grant year. Grantee agrees that its books and records will be made available for inspection by the Foundation during reasonable office hours.

- 7. Grantee will supply the Foundation with such other information as may be necessary or desirable to permit the Foundation to review the use made of this grant.
- 8. Grantee will not disburse grant funds provided by the Foundation for any political campaign or to support attempts to influence legislation of any governmental body.
- 9. Grantee understands that the Foundation has no continuing obligation to make subsequent grants or otherwise finance any project of the grantee organization beyond the grant period specified herein. The Foundation may rescind funds allocated if grantee fails to comply with this agreement in any way or if IOLTA grant funds are not available to the Foundation for any reason.
- 10. If you have any questions about the Grant Conditions and Agreement please contact:  
 Karen Schmidlkofer, Controller  
 Alaska Bar Association  
 840 K Street, Suite 100  
 Anchorage, AK 99501  
 (907) 272-7469

GRANTEE HEREBY AGREES to the terms and conditions of the grant as recited above.

Grantee: \_\_\_\_\_

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Approved at the direction of the Board of Trustees of the Alaska Bar Foundation.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_