

# Julius Bär

FOUNDATION

To fill in the form correctly, kindly use Adobe Reader and click in the respective light blue text fields. Please do not use the comment function to fill in this form. All filled-in forms are imported in a software and processed automatically. Therefore, we can only consider Grant Applications that use this form, completed in Adobe Reader as described above, submitted electronically in English, and containing all of the necessary documents. If you do not have Adobe Reader installed yet, please download the free software before filling in this form. Kindly do not use any other software (e.g. no MacOS software). If you are using another software, please mind that we will not accept the application and ask you to resubmit it.

## GRANT APPLICATION FORM

### 1. APPLICANT/ORGANIZATION

1.1. Name of the organization (max 60 characters)	<input type="text"/>	
1.2. Legal status	<input type="text"/>	
1.3. Address (max 60 characters)	<input type="text"/>	
1.4. Postal code	<input type="text"/>	1.5. City <input type="text"/>
1.6. Country of incorporation	<input type="text"/>	
1.7. Contact person	Title :	<input type="text"/>
	First name :	<input type="text"/>
	Last name :	<input type="text"/>
	Position in organization :	<input type="text"/>
	Tel. :	<input type="text"/>
	Email :	<input type="text"/>
1.8. Three core competencies of the organization (max 360 characters)	<input type="text"/>	
1.9. Total budget of the organization (in CHF) (1)	<input type="text"/>	
1.10. Main sources of revenue, such as: - Private donors - Institutional donors - Government agencies - Properties or other investments	<input type="text"/>	

- (1) Total annual budget of the organization, incl. staff, fundraising costs and if applicable costs of decentralised regional offices.  
(2) Overhead costs including administration & management, office rent maintenance, communication, materials and fundraising costs  
(3) See definitions of our core areas on the homepage [www.juliusbaer.com/foundation](http://www.juliusbaer.com/foundation)  
(4) For example disadvantaged communities, women, LGBTQ+ communities, cultural and ethnic minorities.  
(5) Overhead costs including administration & management, office rent maintenance, communication, materials and fundraising costs  
(6) Do you generate income with product sales, services or training (e.g. tuition fees)?

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## 1.11. Details on sources of revenue

Source of revenue (from)	Amount (in CHF)
Total	

## 1.12. Organization's overhead costs (in %) (2)

## 2. PROJECT

### 2.1. Core Area (2)

Wealth Inequality

Education Inequality

### 2.2. Name of proposed project (max 360 characters)

### 2.3. Executive summary (describe your project in max 720 characters)

### 2.4. Goal of proposed project (max 145 characters)

### 2.5. Country of proposed project

Region/City

### 2.6. Number of **direct beneficiaries** planned by year

Number of these from potentially vulnerable groups (4)

### 2.7. Number of **indirect beneficiaries** planned by year

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**Julius Baer Foundation**

Bahnhofstrasse 36, P.O. Box, 8010 Zurich, Switzerland  
[foundation@juliusbaer.com](mailto:foundation@juliusbaer.com)

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2.8. **When** did/will this project **start**?

2.9. **When** will this project be **completed**?

2.10. How will this project **become sustainable**? (Describe in 2-3 sentences)  
(max 360 characters)

2.11. Name of **local partners** if applicable

2.12. Names of project stakeholders if applicable

2.13. **Requested amount per year** from the Julius Baer Foundation (in CHF)

2.14. Project's overhead costs (5)

2.15. Income generation from the project (6)

Yes

No

2.14. Project leader's

Title :

First name :

Last name :

Has held their current position since :

Tel. :

Email :

### 3. MANDATORY ATTACHMENTS

- Last year's annual report
- Organisation's statutes
- List of the names of organization's board members, senior management and project leaders
- CV project leader / qualified staff
- Proposal / project description (maximum 7 pages)

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Detailed budget

Location :

Date :

**Please send the completed application form and all attachments to  
foundation@juliusbaer.com**

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