

Direct Grant Application Prep Pack

INFORMATION NECESSARY TO COMPLETE A DIRECT GRANT APPLICATION

US Retail Share Fund

Application Check List

This packet provides the information you will need to apply for a US Retail Share Fund grant. This packet **IS NOT** the grant application.

This packet provides a check list for US Retail associates to use as a guide for completing an application. Associates must complete the following before submitting an application:

- Review enclosed information.
- Gather supporting documentation relevant to your situation.
- Submit application online at WWW.STAPLESHAREFUND.ORG

Your application will not be considered complete until you have completed all the above steps.

ELIGIBILITY

The Share Fund will assist when there is an exhibited financial need. It is possible to have a qualifying event AND a qualifying expense, but not meet the eligibility for a Share Fund grant, because you have the financial means to pay the expense you are requesting from US Retail Share Fund.

QUALIFYING EVENTS AND EXPENSES

Below is a chart listing the basic eligibility for a US Retail Share Fund grant. This chart is a very reliable way of determining if your hardship qualifies for a Share Fund grant. It is important to remember the circumstances below cover the associate, their spouse or domestic partner, or legal dependents ONLY. Parents, grandparents and siblings generally do not fall in this category. If your situation is not in this chart, then you most likely will not be able to receive assistance through the Share Fund.

IMPORTANT NOTE ABOUT QUALIFYING EXPENSES: Federal law prohibits the US Retail Share Fund from making any grants designed to replace or supplement US Retail compensation or benefits to its associates. Due to this law, the Share Fund CANNOT provide grants to pay for medical expenses.

DOCUMENTATION

The list below shows basic document requirements based on the qualifying event. However, once the application has been received, additional information not included on this list may be required. The Share Fund will inform the applicant via email and phone to request additional information.

Your prompt attention to the request for additional information is appreciated.

| Qualifying Event | Qualifying Expense <i>(Caused by Qualifying Event)</i> | Required Documentation |
|--|---|---|
| <p>Illness or Injury To assist associates or immediate family member (spouse/domestic partner or dependents ONLY) who have encountered financial hardships for reasons beyond their control (illness, injury) with household expenses or travel expenses to appointments.</p> | <ul style="list-style-type: none"> • Past Due rent or mortgage. • Past Due basic utilities. • Travel expenses to attend appointments. <p><i>Note: Share Fund does not provide funding for medical bills.</i></p> | <ul style="list-style-type: none"> • Medical leave documentation or FMLA¹ form (if applicable). • Doctor’s note documenting dates associate was not able to work. • Itemized medical bill statement to prove illness/injury occurred. • Documentation of time off from work due to medical reasons. • Travel receipts to attend appointments. |
| <p>Death Available to assist those who have incurred the loss of an associate or immediate family member (spouse/domestic partner, parent or dependents ONLY) if the associate is</p> | <ul style="list-style-type: none"> • <u>Essential</u> funeral expenses for deceased family member. • Travel expenses to attend the funeral or to make funeral arrangements. • Past due rent or mortgage. | <ul style="list-style-type: none"> • Itemized funeral invoice or estimate • Proof of the death of relative (death certificate or obituary). • Transportation receipts showing cost and date of travel to funeral or travel to plan arrangements. |

¹ PLEASE NOTE the US Retail Share Fund DOES NOT require details on diagnosis. We simply need to know the associate is unable to work during a particular time frame as a result of their doctor's instruction.

| Qualifying Event | Qualifying Expense <i>(Caused by Qualifying Event)</i> | Required Documentation |
|--|---|--|
| <p>Death (continued) financially responsible for arrangements. An associate's spouse/domestic partner may apply for assistance in the event of an associate's death.</p> | <ul style="list-style-type: none"> Past due basic utility bills. | <ul style="list-style-type: none"> Copy of past due bills. |
| <p>Natural Disaster (hurricane, tornado, flood, ice/wind/snowstorm affecting the associate's primary residence). Associate's primary residence is severely damaged, destroyed or rendered unlivable by a localized natural disaster (fire, flood, tornado, mudslide, etc.) or federally/state declared natural disaster or terrorist attack, or associate is displaced from home and forced to pay for alternative housing.</p> | <ul style="list-style-type: none"> Uninsured/Underinsured needed repairs to primary residence. Security deposit to move into a new residence. Emergency housing (if needed). Past due rent or mortgage. Past due basic utilities. Food. Necessary items lost due to event. | <ul style="list-style-type: none"> Insurance report of damages or current insurance declaration page. Proof of deductible amount from insurance company. Insurance decision (i.e., amount awarded by insurance, or denial of coverage). Itemized contractor quote showing amount needed to make repairs to primary residence. Fire report from local fire department or other proof of fire. Statement from community organization assisting associate (i.e. American Red Cross, fire/police department, shelter, etc.). Copy of past due bills or travel expenses. |
| <p>Unemployment Loss of a spouse's job or associate's second job due to a lay-off or company closure within the past 6-months. US Retail jobs excluded.</p> | <ul style="list-style-type: none"> Past Due rent or mortgage. Past Due basic utilities. | <ul style="list-style-type: none"> Copy of the termination letter with date and reason of termination, or Copy of paperwork from unemployment office, showing date and reason of separation. Copy of past due bills. |
| <p>Housing Instability Associates in need of new housing due to:</p> <ul style="list-style-type: none"> Rental unit/home condemned or deemed uninhabitable due to unsafe living conditions. Unforeseen sale/foreclosure of a home rented from a private landlord and the associate is forced to find new residence with less than 30 days' notice. (foreclosure of a home owned by the associate DOES NOT fit this circumstance.) | <ul style="list-style-type: none"> Security deposit to move into a new residence. Past due rent or mortgage (if applicable) | <ul style="list-style-type: none"> Inspection report, or other documentation showing how the home is uninhabitable. Associates requesting assistance as a result of the sale or foreclosure on their RENTED residence are REQUIRED to submit proof of the sale or foreclosure including: <ul style="list-style-type: none"> Foreclosure notice from the landlord or owner of the rented property. Documentation showing the property is for sale. Current lease or proof of address. Eviction notice. New lease or rental agreement including dates and rent/security deposit amounts. |
| <p>Domestic Abuse Associate in unsafe home environment and is need of new housing.</p> | <ul style="list-style-type: none"> Security deposit to move into new residence. Temporary housing if needed. | <ul style="list-style-type: none"> Police report or restraining order documenting the abuse. Copy of past due bills. |
| <p>Military Deployment Associate, immediate family member or spouse/domestic partner who has encountered financial hardships after being deployed.</p> | <ul style="list-style-type: none"> Rent or mortgage. Other bills where assistance is needed. | <ul style="list-style-type: none"> Copy of deployment orders. Copy of basic utility bills. Copy of rent/mortgage statement. |

All Applications – Required Documentation

To ensure prompt processing of a Share Fund grant, please gather the appropriate documents before submitting your application. The application is not complete until we have received ALL relevant supporting documentation.

REQUIRED FOR ALL APPLICATIONS:

1. Copies of bills for which associate is seeking assistance, for instance:
 - a. Past due mortgage statement.
 - b. Past due rent letter from landlord or eviction notice.
 - c. Past due basic utilities (electric, gas, water/sewer and garbage).
2. Proof of qualifying event causing the financial need, for instance:
 - a. Doctor's Note / Leave documentation.
 - b. Fire/police report.
 - c. Layoff/separation notice.

ORIGINAL documents must be provided wherever available.

***Other documentation may be required to complete the application.
This list is in no way a comprehensive list of documents required.***

NOTE: The Share Fund does not cover car repair, replacement or car insurance or loan, phone, Internet, cable, credit card bills, daycare, student loans, tuition, deductibles, medical expenses, insurance bills, down payments or any type of loan.