

**MENORAH HERITAGE FOUNDATION**

**JEWISH COMMUNITY GRANT/ALLOCATION REQUEST – FINANCIAL REPORT SUBMISSION CHECKLIST**

**WE NEED AGENCY LEVEL FINANCIAL INFORMATION and PROGRAM LEVEL FINANCIAL INFORMATION**

Please provide the following for the AGENCY level information (choose ONE option):

**Option A:**

- A completed **AGENCY BUDGET** form (Exhibit A)
- **Agency balance sheet** (a.k.a. statement of financial position) with the following information:  
**Current fiscal year and prior fiscal year-end** information in comparison format. For example, first column is current info, second column is prior fiscal year-end;
- **Agency income statement** with the following information:  
**Current fiscal year and entire prior fiscal year-end** (a.k.a. statement of activities) in comparison format. For example, first column is current info, second column is prior fiscal year-end

**OR**

**Option B:**

- **Agency budget vs. actual for your prior fiscal year-end** in comparison format
- **Agency budget for current fiscal year**
- **Agency balance sheet** (a.k.a. statement of financial position) with the following information:  
**Current fiscal year and prior fiscal year-end** information in comparison format. For example, first column is current info, second column is prior fiscal year-end;
- **Agency income statement** with the following information:  
**Current fiscal year and entire prior fiscal year-end** (a.k.a. statement of activities) in comparison format. For example, first column is current info, second column is prior fiscal year-end.

Please submit all the reports identified in the option you select.

Please complete the PROGRAM BUDGET form (Exhibit B)

Please see <http://mhfk.org/apply-grant/jewish-community-cycle/> for Financial Documentation Requirements

**SHOULD YOU HAVE ANY QUESTIONS ABOUT THE INFORMATION REQUIRED ON THIS CHECKLIST, PLEASE ASK PRIOR TO SUBMISSION OF YOUR GRANT APPLICATION.**