

# COMMUNITY INVESTMENT PROGRAM CUSTOMER BALLOT

## *Statement of Goals and Guidelines*

Each year, Essex Bank pledges up to 10% of its after-tax net income each year to non-profit organizations and community development projects in the following eleven towns: **Chester, Clinton, Deep River, Essex, Guilford, Killingworth, Lyme, Madison, Old Lyme, Old Saybrook, and Westbrook.**

### **Guidelines for Customer Balloting**

1. Non-profit organizations must be tax-exempt **501(c)(3)s** and must maintain headquarters within the **eleven towns listed above.**
2. Applications from religious or service (Rotary, Lions, etc.) organizations will not be considered.
3. Non-profit organizations must provide proof of their tax exempt 501(c)(3) status, including their federal tax identification number.
4. If applications are received from more than one non-profit organization benefiting the same cause or operation under the same 501(c)(3) designation, bank management may, at its discretion, select one of these organizations to appear on the ballot and reject all others.
5. To effectively promote participating non-profit organizations, Essex Bank management may, at its discretion, limit the number of names appearing on the ballot.
6. **Applications for inclusion on the ballot will be accepted between Sunday, October 12 and Saturday, November 15, 2025.**
7. Customer balloting will take place from **February 1 through February 28, 2026.** A customer is defined as any person having a loan, deposit account, or safe deposit box with Essex Bank. Each customer, regardless of the number of accounts held, will be allowed to complete one ballot form. Duplicates will be discarded. Each ballot form may include votes for up to three of the listed non-profit organizations.
8. Announcement of results and fund disbursement will be completed no later than May 31<sup>st</sup>.
9. Essex Bank Management, Board of Directors, and Trustees reserve the right to make changes to or terminate the Community Investment Program at any time without prior notice.
10. Organizations selected for the Ballot will be notified in December after which they may include digital materials about their organization to be displayed on the Bank website.

Please contact the Essex Bank Marketing Team at (860) 767-4414 with any questions.