

Bank of America Sponsorship Request How-to Document

www.bankofamericasponsorships.com

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Getting started

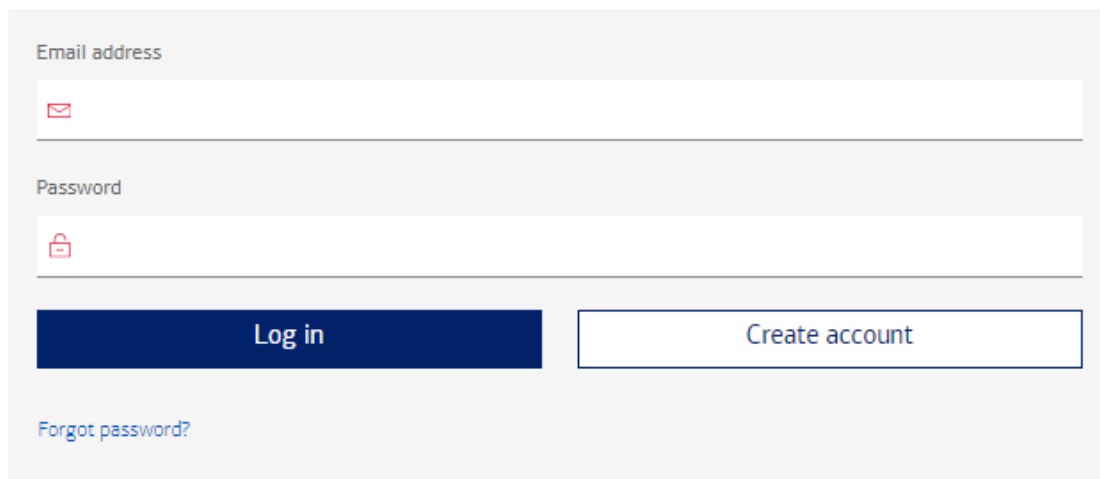
Information checklist

Information and documents that will be needed to complete your request:

- Organization's board members
- Sponsorship package (document describing program, funding levels, benefits)
- If sponsorship is for an extended period or multiple events, dates and locations of all programs included in sponsorship Dashboard
- Other companies/organizations who are also sponsors of the program/event

Creating an account

- To create an account, click **Create account**. Enter your email address and a unique password (eight characters minimum, including upper and lowercase letters and at least one number). Click **Submit**. You will then be logged in to the Dashboard.

A screenshot of a web interface for logging in or creating an account. It features two input fields: 'Email address' with an envelope icon and 'Password' with a lock icon. Below these fields are two buttons: a dark blue 'Log in' button and a white 'Create account' button with a blue border. At the bottom left, there is a blue link that says 'Forgot password?'.

Email address

Password

Log in

Create account

[Forgot password?](#)

- If you are a returning user and have not logged in to Bank of America's Sponsorship Request System since January 20, 2020, you will need to reset your password. Simply enter your email address and existing password, and you will be prompted to change your password. Create a unique password (eight characters minimum, including upper and lowercase letters and at least one number).
- You will be prompted to change your password every 90 days when you log in to the Sponsorship site.

Dashboard

Once your account has been created, you will be directed to the Dashboard, where you can kick off the proposal submission process. Click the Create proposal "+" sign to begin.

Dashboard

To submit a new proposal, click "Create proposal." If you have a saved proposal that has not been submitted, you may make changes by clicking "Edit." Please note: You may only have one draft proposal at a time. Once your proposal is submitted, another may be created. For proposals in draft status, files will be stored up to 90 days and will be deleted at that time. You can only have five proposals submitted at one time.



Eligibility

The questions in this section are to help you determine if you are eligible to submit a sponsorship proposal. Please refer to text above the questions for more detailed information.

TIP: When choosing the primary city or geographic location from the list provided, look for your state, then the closest city listed, especially if you are in a metropolitan area.

Eligibility questions

Are you seeking sponsorship for an individual or an organization? (Select one)


- ☐ Individual
- ☐ Organization

Please identify the primary city/geographic location that would benefit from this sponsorship support. If you are in/near a metropolitan area, please choose the closest applicable site — this will expedite your request.

State of proposed event/organization

Primary city/geographic location

Next step >

Eligibility —Agreement to terms

After the **Eligibility questions**, you will be asked to review the terms of potentially accepting sponsorship funds from Bank of America. Please read carefully and click on the appropriate option.

By clicking "I agree" below, you are certifying that your organization agrees to the terms stated below regarding the prohibition against using sponsorship funds for political purposes.

Bank of America is regulated under federal rules that prohibit national banks and corporations from making a contribution in connection with any election to any political office, or other political activities. This prohibition precludes Bank of America from funding:

- Any organization that is registered or acting as a political committee under federal election law or any state or local election law.
- Any effort to support or oppose any candidates for U.S. federal, state or local office.
- Any bond initiatives or ballot initiatives, either directly or through transferring to any political action committee.

If we approve your sponsorship proposal, you must only use the sponsorship funds for their intended purpose, and in a manner that is consistent with these restrictions. Specifically, these funds may not be used for any direct or indirect political activities. Please understand that by depositing or receiving these funds, or any additional funds that you may receive from Bank of America this year, you are agreeing to these requirements.

I agree

I don't agree

Preparing and submitting a sponsorship proposal

General navigation tips

- You may click **Save** at any time. Your draft proposal will be accessible in your Dashboard space for editing, up until the final step of **Submit proposal**.
- You will receive an error message for any required questions if you have not entered information for the question. You will not be able to proceed to the next step/page until all required fields are completed. ("None", "N/A" or "0" zero can be used if the information requested is not applicable or available.)
- You may correct entries at any time up until you finish **Step 4** and click on **Submit proposal**. After your proposal has been submitted, changes cannot be made.
- For technical issues, please use the Sponsorship Technical Help System. You may also find it helpful to refer to the FAQ document posted on the tool bar.

Step 1: Organization overview

If you are eligible to submit a sponsorship proposal, you will be directed to the first page of the proposal form, the **Organization overview**. The **Organization overview** asks for basic information about the organization or property, including address, contact information and board members/owners. The top navigation of the form provides a clear view into the proposal path.

Step 1:

Organization overview

All fields are required unless otherwise indicated. You must answer all the required questions to advance.

Step 1 of 4:	Step 2 of 4:	Step 3 of 4:	Step 4 of 4:
<u>Organization overview</u>	Sponsorship details	Description	Preview proposal

You may click **Save** at any time to save the proposal as a draft that will be accessible in your Dashboard space. Once the **Property overview** is complete, click **Next step**

Next step >

Save

Step 2: Sponsorship details

Once you have completed the **Property overview**, you will move to **Sponsorship details**. Here you will enter additional information about the sponsorship opportunity, including event name and location, funding amount requested and estimated attendance.

Step 2:

Sponsorship details

All fields are required unless otherwise indicated. You must answer all the required questions to advance.

Step 1 of 4:
Organization overview

Step 2 of 4:
Sponsorship details

Step 3 of 4:
Description

Step 4 of 4:
Preview proposal

Sponsorship overview

Official name of sponsorship or event

Choose the category that best describes your opportunity

--

Sponsorship amount requested (in \$ USD)

How long has this event/sponsorship been held?
(For a new event, enter "0")

Estimated attendance or viewers (Please do not include exhibitor, staff, etc.)

Does this sponsorship benefit any low-to-moderate income constituents?

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Sponsorship amount requested— If you have multiple funding options, please enter the single, most appropriate level. We will see and review the other options in the sponsorship package(s) you upload and contact you if we have questions or want to discuss further.

Current sponsors— Click on the “+” sign to enter information about your current sponsors. If you do not have any sponsors, either add your organization or enter “N/A” for the sponsor name, Other for the category and the current year in the **Sponsor since year** field.

Locations and dates— Click on the “+” sign to enter information about each event or location included in the sponsorship package.

Once the Sponsorship details page is complete, click **Next step**.

Next step >

Save

Step 3: Description

Description is the final section of the sponsorship request form. Provide a short description of why Bank of America should consider this opportunity.

Step 3:

Description

All fields are required unless otherwise indicated. You must answer all the required questions to advance.

Step 1 of 4:
Organization overview

Step 2 of 4:
Sponsorship details

Step 3 of 4:
Description

Step 4 of 4:
Preview proposal

Sponsorship opportunity description

Please explain why your sponsorship opportunity should be considered. (1,000 character maximum) (0 / 1000)

Sponsorship benefits

Please describe the benefits offered to sponsors. Examples include event tickets, branding/advertisement, speaking opportunities, etc. (1,000 character maximum) (0 / 1000)

Once complete, click **Next step**. (Your entries will automatically be saved when you click **Next step**.)

Next step >

Save

Step 4: Preview proposal and submit

Preview proposal allows you to verify all information entered throughout the request form is correct. If you need to make changes, navigate to the applicable section either by clicking

Step 4:

Preview proposal

Please review your information to make sure it's correct.

Step 1 of 4:
Organization overview

Step 2 of 4:
Sponsorship details

Step 3 of 4:
Description

Step 4 of 4:
Preview proposal

Organization seeking sponsorship identification information

Legal name of organization Test	Organization address 1 Test
Organization address 2 (optional)	Organization city Test
Organization state NC	Organization ZIP/postal code 29715
Organization website www.test.com	State/primary geographic location NC - Charlotte
Does your organization have a current relationship with Bank of America? No Current Relationship	Current bank contact name
Is your company a 501(c)(3) organization? No	Is your company a 501(c)(4) or 501(c)(6) organization? No

Contact information

Salutation (optional)	First name Test
Last name Test	Middle initial
Job title Test	Phone 999-111-2222

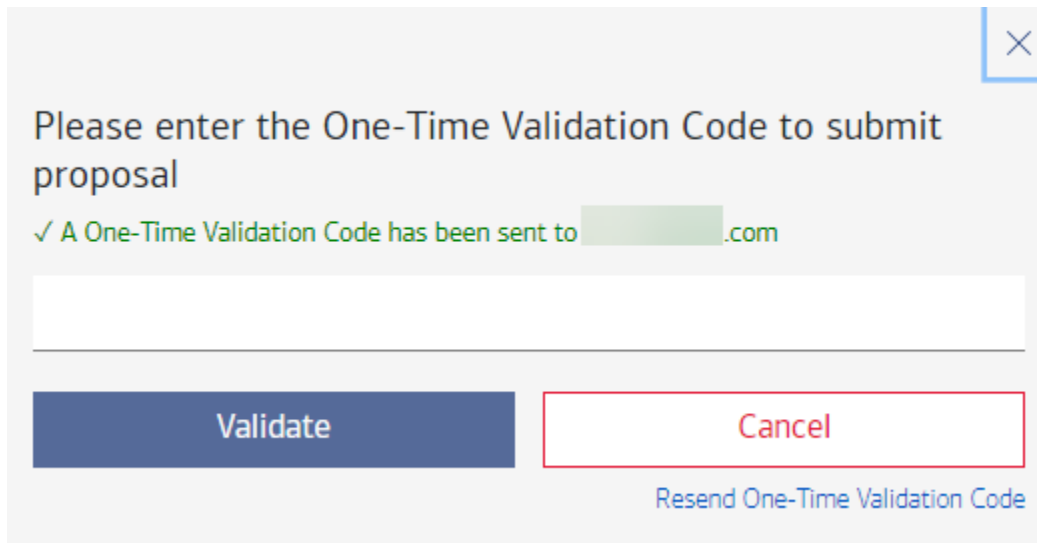
Once reviewed, click **Submit proposal** to formally kick off the review process.

Note: Once you click Submit proposal, no further changes can be made.

< Previous step

Submit proposal

A **6-digit validation code** will be sent to the email address you logged in with. Enter it in the popup window:

A light gray rectangular popup window with a close button (X) in the top right corner. The text inside reads: "Please enter the One-Time Validation Code to submit proposal". Below this is a green checkmark icon followed by the text "A One-Time Validation Code has been sent to [redacted].com". There is a white rectangular input field for the code. At the bottom, there are two buttons: a blue "Validate" button and a white "Cancel" button with a red border. Below the "Cancel" button is a blue link that says "Resend One-Time Validation Code".

Please enter the One-Time Validation Code to submit proposal

✓ A One-Time Validation Code has been sent to [redacted].com

Validate **Cancel**

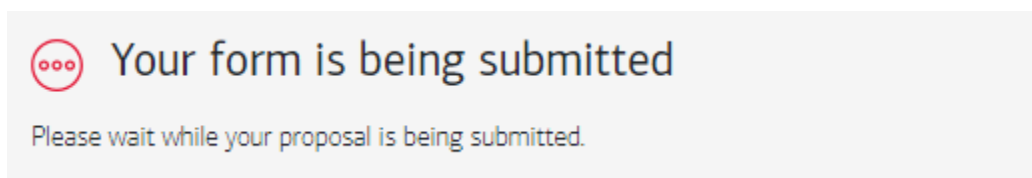
[Resend One-Time Validation Code](#)


Note: if you do not receive the code, check your spam folders or filters. The email will be sent from **no-reply@sponsorship.bankofamerica.com** . The code is valid for 15 minutes.

If you need a new code, click **Resend One-Time Validation Code** in the popup window.

A validation code MUST be entered to complete the submission process. The request will remain in Draft status until the validation is completed.

Once the validation is complete, the form will be submitted.

A light gray rectangular box with a red circular icon containing three dots on the left. The text reads: "Your form is being submitted". Below this is a smaller line of text: "Please wait while your proposal is being submitted.".

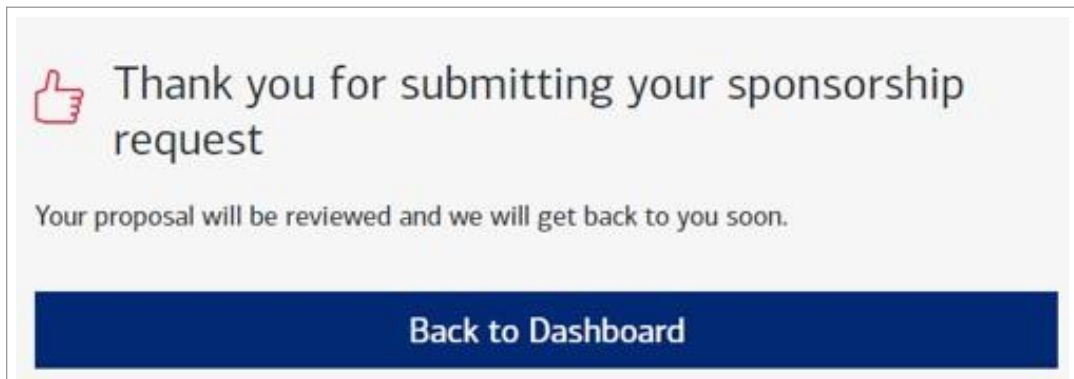
 **Your form is being submitted**

Please wait while your proposal is being submitted.

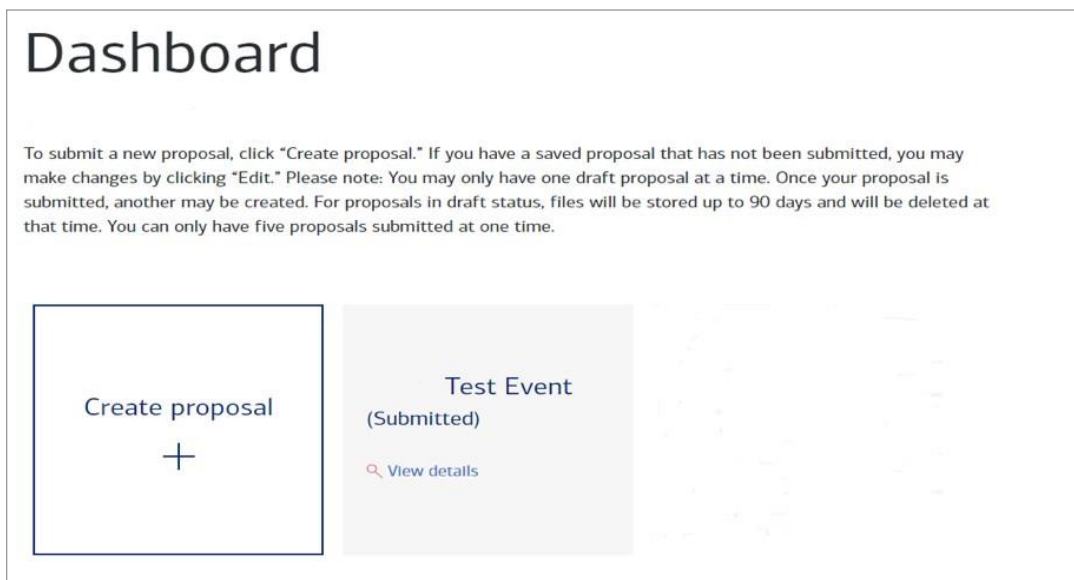
Post-submission

Proposal status

Once your proposal has been submitted, click **Back to Dashboard**.



The status of your proposal request is now "Submitted". We normally review proposals and respond within 45 days of receipt unless the event date is several months in the future. Once a decision is made, you will be contacted with that information. Status of your proposal will change on the Dashboard after a decision is made.



Thank you for your sponsorship proposal. You may begin a new proposal for a different program once your proposal status is "Submitted."