



Invest in Others Redesigned Grant Program

Invest in Others has redesigned its Grant Program to make it easier than ever for financial advisors to secure funding for the nonprofits they champion. Now with **more than \$2 million in annual grant funding**, a streamlined application, and year-round access, the program offers greater opportunities for advisors to support causes they care about and help nonprofits expand their impact. **The Invest in Others Awards are now integrated into the grant application**, allowing advisors to opt in for additional funding and recognition through a single application.

How the Grant Application Process Works

The Invest in Others grant application is designed to make it easy for Financial Advisors and nonprofits to collaborate while allowing each to provide information specific to their role. Applicants can apply through our grant website: <https://investinothers.org/grantprogram/>.

Step 1: Confirm Eligibility

Begin by completing a short eligibility form. If the eligibility requirements are met (see page 2), the applicant will receive immediate access to the full grant application.

Step 2: Complete the Application

The application includes two separate sections:

- **Financial Advisor Section:** Completed by the financial advisor
- **Nonprofit Section:** Completed by a representative of the nonprofit organization

The financial advisor can invite a nonprofit contact to collaborate on the application. Each party will complete their respective sections independently.

Step 3: Submit the Completed Application

Both the Financial Advisor and Nonprofit sections must be completed before the application can be submitted for consideration.

Step 4: Application Review

Once submitted, applications are evaluated using a standardized scoring rubric designed to support a consistent and objective review process.

As part of our commitment to broadening the reach of our grantmaking, applications are also considered across factors such as communities served, geographic representation, and financial advisor demographics.

Step 5: Notification & Next Steps

Financial advisors and nonprofit contacts will be notified of the funding decision the week of January 4, 2027. Selected organizations will receive additional instructions regarding the grant agreement, funding process, and reporting expectations.



Invest in Others Awards - Optional Advisor Recognition

As part of our program redesign, **we've eliminated the separate Awards nomination process and integrated Awards consideration directly into our grant application.** When applying for a grant, financial advisors can opt in to be considered for the [Invest in Others Awards](#). Participating advisors will answer a few additional questions regarding their personal leadership, volunteer service, and commitment to the nonprofit.

Those who secure grant funding and opt in will advance to the awards review process. To be eligible for the event, opted-in advisors must submit their grant application by May 1, 2027. Finalists will be notified in July 2027, ahead of the Invest in Others Awards ceremony in Boston on September 16, 2027.

Eligibility Criteria

Financial Advisor

- Must be an active financial advisor, spending at least 75% of their time providing financial consultation to clients.
- Must have volunteered with the nonprofit for at least 12 months prior to applying.
- Past grantees and honorees are eligible to apply beginning January 2027, regardless of when they last received funding.
- Advisors may receive funding for up to three consecutive years, followed by a one-year waiting period.
- Awards Finalists and Recipients are eligible for recognition again after five years.

Nonprofit

- Must be a verified 501(c)(3) public charity in good standing with the IRS.
- Must have been established and received its IRS determination at least 12 months prior to the application.

Grant Application Questions	
Financial Advisor Questions	Nonprofit Questions
1. When did you start working with this nonprofit?	1. Nonprofit mission and area of impact
2. How many unpaid hours do you volunteer with this nonprofit monthly?	2. What is the geographic scope of the organization?
3. What is your current role with this non-profit?	3. Populations served
4. What resources or services do you offer to the nonprofit organization?	4. Annual Operating Budget, FTE, and volunteers
5. Why do you believe it is important for Financial Advisors to support nonprofits?	5. Funding amount requested (up to \$25k)
	6. What is the primary focus, goals, and demographics served with these funds?

Key Dates	
Beta Test Grant Program Launch	October 15, 2026
Beta Test Applications Due	December 4, 2026
Beta Test Applicant Notifications	January 4-8, 2027
Public Launch of Grant Program (No deadlines to submit)	January 19, 2027
2027 Awards Eligibility Cutoff (Applications must be submitted by this date to be considered)	June 1, 2027
2027 Awards Finalists Notification	July 2027