



Ruth and Paul Dickinson Trust Guidelines

Ruth and Paul Dickinson had a heart for meeting charitable needs, especially in Central and Southern Oklahoma – the place they lived, and the place their businesses were located. This trust is administered by WatersEdge Advisors as trustee. Each year, this trust provides charitable distributions to worthy applicant charitable organizations, as approved by the Board of Directors of WatersEdge.

According to the Last Will and Testament of Paul Dickinson, Sr., there are two provisions under which your charitable organization may qualify: general and medical.

The first portion (general) is to benefit *“charitable organizations whose primary purpose is to meet human need, alleviate human suffering, and/or promote the growth and development of young people with particular preference given to those organizations and institutions which service the needs of people living in Central and Southern Oklahoma. Such charities shall be limited to organizations which are organized for purposes and carrying out functions that consistent with Southern Baptist tradition and belief. Said distributions of earnings and income shall be determined by the Board of Directors of WatersEdge in its sole discretion.”*

The second portion (medical) is to *“assist and provide for medical research and medical care for the needy. Such institutions or programs shall constitute acute care hospitals, hospitals operated by or in conjunction with an accredited school of medicine, schools of nursing, research hospitals, or other institutions providing medical care and treatment, within the United States of America. Such institutions or programs shall be limited to those which are organized to carry out functions and provide services in a manner consistent with Southern Baptist traditions and beliefs. Said distributions of earnings and income shall be determined by the Board of Directors of WatersEdge in its sole discretion.”*

In all cases, *“distribution of funds shall be limited to those organizations that are, at the time of such distribution, exempt from income tax by reasons of provisions of the Internal Revenue Code, 501(c)(3), and Code Section 2055, as may be amended from time to time.”*

HOW TO APPLY

Grant applications for the Ruth and Paul Dickinson Trust are located online and may be printed for submission. Find them at www.WatersEdgeServices.org.

Specific guidelines are as follows:

- Applications must be received in the WatersEdge offices by the close of business on the first Friday of November each year. Applications received after this time will not be considered.
- Acceptance and consideration of applications is at the sole discretion of the Board of Directors of WatersEdge.
- A list of required enclosures is shown on the application. Please submit only the items listed.
- Please keep your submissions to a maximum of 15 pages.

Ruth and Paul Dickinson Trust Frequently Asked Questions (FAQs)

WHAT DOES THE BOARD OF DIRECTORS LOOK FOR WHEN REVIEWING APPLICATIONS?

If you're applying under the general section, they look for several things: whether your organization is located within Central and Southern Oklahoma, primarily exists to meet human need, alleviate human suffering, and/or promotes the development of young people.

If you're applying under the medical section, they look for several things: whether your organization assists and provides for medical research and medical care for the needy, is an acute care hospital, operates in conjunction with an accredited school of medicine, school of nursing, research hospital, or other institutions providing medical care and treatment within the United States.

The above factors are not intended to be an exhaustive list of considerations. The Board of Directors must also consider the limited funds available versus the number of applications received and the corresponding amounts requested. On average, about \$43,000 total is available to award amongst worthy applicants.

THE LAST WILL AND TESTAMENT OF PAUL DICKINSON, SR. STATES THAT ALL APPLICANT ORGANIZATIONS SHOULD BE ORGANIZED TO CARRY OUT FUNCTIONS AND PROVIDE SERVICES IN A MANNER CONSISTENT WITH SOUTHERN BAPTIST TRADITIONS AND BELIEFS. HOW SERIOUSLY IS THIS FACTOR CONSIDERED?

Very. We take seriously our fiduciary responsibility to remain true to the governing document of this trust and to carry out the grant process in a manner which honors Ruth and Paul Dickinson.

MAY MY ORGANIZATION APPLY UNDER BOTH SECTIONS, GENERAL AND MEDICAL?

Yes. However, please remember that the purpose for which you're applying under each section should be consistent with the specific criteria for each section.

WHEN WILL MY ORGANIZATION KNOW WHETHER FUNDS HAVE BEEN GRANTED TO US?

The Board of Directors will review grant applications at its January board meeting. Your organization will be notified as to the approval or rejection of its grant application soon afterward. Distribution checks will be mailed in early February.

WHERE DO I SEND MY APPLICATION AND ENCLOSURES FOR SUBMISSION?

Please mail or fax completed forms to:
WatersEdge Advisors, Trustee
Ruth and Paul Dickinson Trust
Attn: Client Relations
3800 N May Ave
Oklahoma City, OK 73112

WHO CAN I CONTACT WITH QUESTIONS?

You may contact Tamara Hill by email at thill@WatersEdgeServices.org or by phone at 405-949-9500.