

Plutus Foundation Grant Expense Eligibility Checklist

Use this checklist to ensure all expenses in your proposal align with our funding guidelines. If an expense falls into a "Needs Justification" category, provide a detailed explanation in your application.

Allowed Expenses (No Additional Justification Required)




- Educational Materials & Supplies** (workbooks, handouts, digital resources, notebooks, pens)
 - Printing Costs** (flyers, signs, banners, brochures)
 - Direct Program Staff Salaries** – *Capped at 25% of grant* (facilitators, registration help, contracted help during program/event)
 - Program Development** (curriculum creation, instructional design)
 - Photography/Videography**
 - Venue and Booth/Table Rental** (for workshops, classes, events)
 - Essential Technology** for the duration of the grant/program (software, licenses, digital platforms)
 - Registration landing pages** – *Capped at 10-15% of total budget*
 - Evaluation & Reporting Costs** (surveys, assessments, program impact tracking)
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Needs Justification & Pre-Approval

Provide a **detailed explanation** of how these expenses directly contribute to financial literacy education:

- Event Speaker Honorariums/Fees** (Must align with program goals, reasonable market rate)
 - Participant Stipends** (Needs strong justification)
 - Food & Beverages** (Allowed for long workshops, no alcohol, reasonable per-person cost)
 - Travel & Transportation Costs** – *Capped at 50%* (Only for program-related travel; not luxury travel)
 - Equipment Purchases or Rentals** (Laptops, sound equipment – Must be used exclusively for program delivery)
 - Childcare or Participant Support Costs** (Must be necessary for program access)
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Not Allowed (Will Not Be Funded)

-  **General Operational Costs** (rent, utilities, unrelated office expenses)
-  **Capital Expenditures** (building renovations, furniture, major facility upgrades)
-  **Luxury Travel & Accommodations**

- ✗ **Entertainment expenses (including meals, alcohol, and performances)**
 - ✗ **Fundraising Activities**
 - ✗ **Marketing & Outreach** (Social media ads, press/media, branded swag, general branding and awareness)
 - ✗ **Personal Cell Phones, Laptops, or Equipment for Staff**
 - ✗ **Purchase of grantee's own books**
 - ✗ **Salaries/payments for operating expenses** (such as, but not limited to, membership in professional organizations, virtual assistants, website designers, business coaches, and consultants)
 - ✗ **Gifts, Awards, or Incentives Over a Reasonable Value**
 - ✗ **Lobbying or Political Activities**
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Final Checklist for Applicants

- Have you categorized all expenses according to the list above?
- Have you provided justification for any expenses in the "Needs Justification" section?
- Are all expenses clearly tied to program objectives?
- Have you ensured no prohibited expenses are included in your budget?

For any expenses that require justification, please submit a written explanation along with your budget proposal. Applications with ineligible expenses may be subject to revision before approval.

Also note, Receipts are required for reimbursement of any item or expense over \$25.
