



12-POINT DUE DILIGENCE PROCESS

1. Operating Partner's Mission fits that of The Patriot Fund
 - Primarily provides medical and legal services, education, employment and housing with occasional exceptions.
2. Review of 501(c)3 Non-Profit Standing
 - Is the Organization in good legal status
3. Thorough review of Corporations Form 990 – IRS
4. Third-Party Review
 - IE: Charity Navigator, Guide Star and Great Non-Profits
5. Review of Social Media
6. Number of Individuals (Veteran and Family Members) Impacted
 - Takes into consideration not only the utilization of the specific Patriot Fund Grant, but the benefits provided to Veterans/military families from all sources of revenue.
7. Executive, Operational and Administrative Structure
 - No greater than 15% of yearly total revenues (may vary based on the size and mission of the Operational Partner)
 - [Majority of revenue (~ 85%) directly impacts Veteran programs]
8. In-depth Interview with Patriot Fund Due Diligence Committee Leadership
9. Participation in and Attendance at Patriot Fund Events
10. Testimonials, Interactions, and other sources of support
11. Patriot Fund Board Advocate Feedback and Diligence
12. Annual Review of Due Diligence Process
 - On-going process throughout the year after grant delivery to ensure that each Operational Partner is meeting the Statement of Expectations agreement.

Our 12-Point Due Diligence Process, led by a retired Army Major General, is detailed, continuous and comprehensive.