



GRANT REQUEST GUIDELINES

Warning: Fraud is a crime. Providing false information to the Gene Upshaw Player Assistance Trust (GU PAT) in an effort to improperly obtain assistance or any misuse of GU PAT payment information to improperly obtain funds from the PAF will result in a rejection of your grant application and/or a referral to the appropriate authorities for possible prosecution.

I. GOALS

The Professional Athletes Foundation (PAF) created the Gene Upshaw Player Assistance Trust (GUPAT) fund to provide financial support to any former professional and amateur football player or his immediate family in times of financial crisis. The GUPAT is governed by the elected board of directors for the Professional Athletes Foundation which oversees all aspects of the funding process.

II. APPROVED USE OF FUNDS

The GUPAT Fund was created to provide short-term financial assistance to former players who may be faced with a financial or medical crisis. The GU PAT can also serve as a resource for former players that are interested in returning to school to complete their undergraduate degree or obtain a trade certification. **Players seeking Educational Assistance that are eligible for The Trust's Scholarship Award Benefit, must apply via The Trust (Powered by the NFLPA). Please call 1.866.725.0063 to inquire.**

The GU PAT funds are intended to provide immediate assistance when players are faced with unusual financial, medical, or educational challenges that may call for temporary assistance. For instance, grant assistance may range from supporting a family while a player is hospitalized, assisting when a catastrophe such as home fire hits, providing tuition assistance for a former players' return to school, or assistance to keep utilities current during a demonstrated hardship. ***All applicants are expected to exhibit need.***

Funds cannot be used for long-term financial support, or supplemental income to pension and/or disability benefits. Grants are not available as loans for business transactions or purposes.

Types of Grants:

- 1. Financial**
- 2. Medical**
- 3. Financial/Medical**
- 4. Financial/Educational**
- 5. Educational (for undergraduate degree completion/certifications only)**

III. CRITERIA FOR GRANT CONSIDERATION

All grant requests are reviewed by a four-member grant review subcommittee of the board of directors appointed by the president on a rotating, yearly basis. Players will be notified of the committee's decision within 30 days of receiving a complete grant request. In reviewing grant requests, the grant review committee will look for demonstrated need created by:

- Illness of player or immediate family member;
- Chronic illness;
- Chronic illness due to football injury;
- Unforeseen event to a former player, spouse, and/or children;
- Lack of or no medical coverage;
- Education or career transition (from active football).

IV. APPLICATION PROCESS (PLEASE READ CAREFULLY)

All requests for grant assistance **must** include the following information:

1. **Letter of application.** Should state clearly why the money is needed, specifically how it will be used, amount requested, type of grant you are applying for, and your plan to maintain your financial responsibilities after assistance. Applicants can only apply for one grant.
2. **A signed copy of your most recent Federal Income Tax Return in its entirety.** If you indicate 'married, filing separately', on your tax return, a copy of your spouse's signed tax return is also required.
 - a. If you are applying after the Federal Tax filing deadline during any calendar year, a copy of the previous year's Federal Tax Return is required. Conversely, if you are applying for assistance prior to the Federal Tax Filing deadline, a copy of the previous year tax return is required.
 - b. ***For any applicant that is not required to or did not file a tax return, you must contact the IRS to request a copy of your tax transcript for the current tax period. Please be ready to provide your social security number to the representative when calling.***
 - **IRS: (800) 829-1040**
 - www.IRS.gov
 - c. Applicants that have not filed taxes or have a significantly different income currently than what is reflected on your most recent Federal Income Tax Return may be required to submit documentation that reflects your current financial status (i.e., pay stubs, bank statements, letters from employer, etc.).
3. **Doctor's corroboration** is needed if applying for the medical assistance and support for medical treatment requested.

4. **Copies of all the bills you would like the Grant Review Committee to consider for payment must be included with your request.** Bills cannot be added once the Grant Review Committee has decided on your grant request. Bills submitted should be those covering necessary daily living expenses. Some examples include rent/mortgage, utilities, car note, etc. “Luxury items”, such as multiple cell phone bills, private school, or college tuition for children will not be considered. Please note:
 - a. ***The GU PAT Fund cannot pay credit card bills, personal loans, student loans, legal expenses of any kind, purchase a vehicle or home, or pay any money owed to the IRS, Federal or State on behalf of any applicant.***
 - b. ***Should an applicant request financial assistance for a necessary car or home repair, a total of three (3) repair estimates are required. The Grant Review Committee will not honor the request unless all are submitted.***

5. **Applicants are required to participate and comply with the GU PAT Credit and Debt Management Support program.** Before submission of a completed grant request, applicants (including spouses, and significant others, if residing together) will be mandated to contact the Credit and Debt Management Support Program through **Money Management International (MMI)**. Please be prepared to provide household income and expenses information to MMI.
 - a. Upon completion of the telephone consultation, MMI will send you a “Proposed Other Action Packet”. You will need to include a copy of this packet with your grant request.
 - **MMI: 1.866.889.9347**

6. If applying for a medical grant, or any combination thereof, for uncovered medical bills in the amount of \$400.00 or above, **you are required to apply to the Union Plus Medical Bill Negotiation Service for assistance in reducing the cost of such bills.** Any bill(s) below the \$400.00 threshold do not require review through the medical bill negotiation service. Include a copy of your submission confirmation e-mail with your request:
 - **Union Plus: 1.800.472.2005**
 - www.UnionPlus.org

7. Included in your full grant request should be evidence that other avenues of support (i.e., Social Security, worker’s compensation, local support, the Bert Bell Players Pension Fund, Health Reimbursement Account (HRA)) have been pursued.

8. If applying on behalf of a player, you must submit proof of legal guardianship.

V. TABLED DECISIONS

If your grant application is ‘tabled’ you will have 30 days to submit the required documentation indicated on the official decision letter.

VI. APPROVED GRANT ASSISTANCE

The amount of grant assistance approved for any applicant is at the discretion of the Grant Review Committee. **No** funds are paid **directly** or mailed to any applicant for any reason or purpose.

All approved grant requests will receive a formal letter of approval from the PAF Director via mail and/or email. Should you have any questions regarding the details of your approval please feel free to contact the PAF at 1.800.372.2000 ext. 168 or 140. In addition, please note that it’s the responsibility of the player applicant to adhere to all details as outlined in your approval letter. Failure to do so will cause a delay in the processing of your grant award.

Please note, after any grant approval, an applicant must wait a minimum of three (3) years before he is eligible to apply for another grant.

Applicants that apply but are denied grant assistance are afforded a one-time appeal of their denial within 30 days of the original denied grant request. Appeals are only considered if additional or updated information (not included with the original grant request) is submitted.

SUBMITTING YOUR COMPLETE GRANT APPLICATION:

Once you have gathered **all** required documents as indicated in the GUPAT guidelines, you can electronically submit your complete request via our secure GUPAT Docusign portal found on www.yourpaf.com/gupat or clicking here.

QUESTIONS?

PAF@NFLPA.COM

(800) 372-2000

Please note that failure to send any of the required items with your grant request will result in a delay in processing your request. Your grant request will not be reviewed until all required documentation is received.

STATEMENT OF FINANCIAL CONDITION

(THIS DOCUMENT MUST BE COMPLETED AND RETURNED WITH YOUR GRANT REQUEST)

Net Assets (value of assets minus liabilities)

- \$0 to \$25,000
- \$25,000 to \$50,000
- \$50,000 to \$75,000
- \$75,000 to \$100,000
- Over \$100,000

Anticipated Annual Income for Year (all sources, including interest and investment income)

- \$0 to \$10,000
- \$10,001 to \$25,000
- \$25,001 to \$40,000
- \$40,001 to \$60,000
- \$60,001 to \$85,000
- Over \$85,000

Special Financial Considerations:

Please indicate if you have applied to OR received funds from the following:

- NFL Player Care Foundation _____
- Gridiron Greats Assistance Fund _____
- Disability, Annuities, Pensions, etc. _____

Are you enrolled in The Trust: Yes No

Are you currently employed: Yes No

If yes, please list current employer and monthly income: _____

GU PAT AUTHORIZATION AND CONSENT TO RELEASE INFORMATION AND RECORDS
(THIS DOCUMENT MUST BE COMPLETED AND RETURNED WITH YOUR GRANT REQUEST)

Name: _____
(Last) (First) (Middle)

Home Address: _____
(Street) (City/State) (Zip Code)

Social Security Number: _____ Date of Birth: _____

Phone Number: _____ Email Address: _____

Spouse's Name: _____ Spouse's Email: _____
In case of emergency/secondary contact.

Health Insurance Coverage: Yes No

Please list any children or adults over the age of 18 currently living in your household: _____

I hereby authorize the Professional Athletes Foundation, Gene Upshaw Player Assistance Trust and all of their agents and employees (hereinafter collectively "GU PAT") to investigate my background in connection with my application for a grant from the Gene Upshaw Player Assistance Trust. As part of the GU PAT's investigation, I authorize the GU PAT to obtain and review any private and confidential information concerning me, including, but not limited to, consumer credit reports; bank and financial institution records; employment, military, civil, regulatory, and educational data; and reports from any individuals, corporations, partnerships, associates, institutions, schools, governmental agencies, and departments, courts, law enforcement, and licensing agencies, consumer reporting agencies, and other entities, including my present and previous employers.

I further release and discharge the Professional Athletes Foundation, the Gene Upshaw Player Assistance Trust, its Board Members, agents, and every employee or agent of any of them, and all businesses, entities and any of their agents or employees that provide such information pursuant to this authorization, from any and all claims and liability arising out of any request(s) for, or receipt of, information or records pursuant to this authorization, or arising out of any compliance, or attempted compliance, with such request(s).

I acknowledge that I have voluntarily provided the above information for qualification for a GU PAT grant, and I have carefully read and understand this authorization. The above is my true and complete legal name, and all of the above information is true and correct to the best of my knowledge. Should there be any question as to the validity of this release, I may be contacted as indicated above.

Signed: _____

Date: _____

Signature of Spouse: _____

Date: _____

The Gene Upshaw Player Assistance Trust Fund Grant Application Checklist

Please use the list below to make sure you have all the required documents before sending your grant request:

- A letter of application**--Should clearly state why the money is needed, specifically how it will be used, total amount requested (for how many months), the type of grant you are applying for, and your plan to maintain your financial responsibilities after assistance. Applicants can only apply for one grant. Please be sure to list each bill and bill amount in in your letter.

- Statement of Financial Condition** (attached to application, page 5)

- Gene Upshaw PAT Authorization and Consent to Release Information and Records** (attached to application, page 6)

- A signed copy of your most recent **Federal Income Tax Return** in its entirety. If you indicate 'married, filing separately', on your tax return, a copy of your spouses' signed tax return is required. ***If you did not file, see page 2 for instructions on obtaining a Tax Transcript.***
 - **IRS: 1.800.829.1040 | www.IRS.gov**

- A **doctor's corroboration** is needed if applying for the medical grant assistance and support for medical treatment is requested.

- Contact **Union Plus medical bill negotiation service** at **1.800.472.2005** for assistance in reducing the cost of such bills. (If you are applying for a medical grant or any combination thereof, and have medical bills that you are submitting for the committee to consider that are not unreimbursed and four hundred dollars \$400.00 or above).

- All of the bills (or copies)** you would like for the Grant Review Committee to consider for payment.

- Contact Money Management International **Credit and Debt Management Support Program** at **1.866.490.0457 or 1.866.889.9347** to speak with a counselor. Afterwards you will be emailed a "*Proposed Other Action Packet*" (*Client Financial Action Plan*), please submit a copy with request. See page 3 for full instructions.

- Included in the grant request should be evidence that other avenues of support (i.e., Social Security, worker's compensation, local support, the Bert Bell Players Pension Fund, Health Reimbursement Account (HRA)) have been pursued.

Please note, failure to send any of the required items with your grant request will result in a delay in processing your request. Your grant request will not be reviewed until all required documentation is received.