

OPERATIONS

FUND ADVISOR TOOLKIT

Northwest Minnesota Foundation



Event Fundraising Checklist

Before Fundraising Event

- Develop a statement defining each program, event, or other effort to raise money.
- Have the applicable licenses, taxes, and liability insurance been secured/paid?
- If accepting registration payments and/or donations at your event, do you have a receipt book, cash box with change for payments, and/or a credit card terminal?

Promotional Materials

- Proof copies were provided to NMF for approval before printing.
- All fundraising materials make clear that funds are being raised on behalf of fund rather than by NMF.
- NMF has been provided a copy of all fundraising/promotional material, and any material using NMF's name.
- Copies of solicitation letters were provided to NMF before distribution.

Expenses

- Has it been determined how expenses will be paid?
- Have copies of invoices been provided to NMF if direct payment to vendor is requested?
- A W-9 form must be completed by vendor and attached to Payment Request Form to be submitted to NMF.

Contributions

- Are all checks made payable to the fund/NMF?
- All proceeds delivered to NMF within one week after the fundraising event? (Please use the donation form.)
- Receipts deposited intact? (Expenses should not be deducted first.)
- If property is donated, a description of the type of property and a good faith estimate of fair market value is provided to NMF.
- Were any goods or services provided to donors for contributions of \$75 or more?
 - If yes, were the quid pro quo disclosures made at the time of solicitation?

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Contributions: Was the following information provided to all potential donors

- Description of the purpose for solicitation.
- The _____ Fund is a component fund of the Northwest Minnesota Foundation.
- The _____ Fund of the Northwest Minnesota Foundation is raising dollars today for the purpose of _____.
- Inquiries can be addressed to the Philanthropy Officer with NMF's address.
- The amount of the contribution deductible as a charitable contribution by federal law.

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