

Fundraising Guidelines

Shwachman-Diamond Syndrome Foundation (SDSF) welcomes all efforts by its friends and associates to assist in raising funds to support our mission and related efforts.

As you are aware, SDSF is a tax-exempt organization pursuant to 501(c)(3) of the Internal Revenue Code. In order for SDSF to comply with its By-laws and the Internal Revenue Code and in order for SDSF to keep accurate records, it is necessary that the following fundraising guidelines be followed:

1. To ensure that contributions are tax deductible by the donor, all checks or money orders **MUST** be payable to SHWACHMAN-DIAMOND SYNDROME FOUNDATION.
2. To host a fundraiser for SDSF, please send an email to info@shwachman-diamond.org so that we can support your event by providing you with bracelets, brochures, the use of our logo, and other supplies as well as helping you advertise your event on our Facebook and Twitter pages.
3. All funds raised in the name of SDSF are expected to be remitted to SDSF.
4. All contributions (including cash) should be directed to the current office of SDSF for recording. The office will then forward contributions to the Treasurer of SDSF for deposit into the proper bank accounts. No other individual is authorized to deposit or endorse checks on behalf of SDSF.
5. Include the name and proper mailing address of each contributor with the contribution. The President is responsible for acknowledging all contributions in accordance with the IRS Code and will keep proof of such acknowledgements with the other financial records of SDSF. In addition to the required notice, anyone is welcome to thank contributors personally.
6. Include any special instructions with the contribution, including but not limited to, the directed use of the contribution (i.e. research, outreach, etc.); the name and address of any individual (other than the contributor) who should be advised of the contribution (i.e. honoree or family of deceased); or whether the contribution should remain anonymous. Contributions may be directed for research; however, they may not name specific types of research or research projects.
7. In accordance with its by-laws, SDSF has established bank accounts for the deposit of all funds authorized by the Board of Directors. The signatures on these accounts consist of the current officers of SDSF. No other individuals may open bank accounts on behalf of SDSF or become signatories of any bank accounts without the prior approval of the Board of Directors.
8. All legitimate expenses of fundraising will be reimbursed or advanced by SDSF. For reimbursement, all individuals should submit an itemized list of expenses and copies of

receipts. For advances, all individuals should submit an itemized proposal of expenses prior to the event and submit copies of receipts within 30 days of the event along with any excess advance. The Board of Directors reserves the right to disallow any expenses. If you have a question about a specific expense, please contact the Board of Directors prior to incurring the expense.

9. No individual or group shall be authorized to reimburse itself out of funds raised on behalf of SDSF.
10. For reimbursement by SDSF, all individuals must evidence of proper permits, if your state requires them. It will be your responsibility to research the legality of your event in your state and provide evidence of same to SDSF.
11. These guidelines have been set forth for your protection as well as the protection of SDSF. SDSF will not be responsible for any fundraising activity that does not comply with these guidelines and cannot guarantee that any resulting contributions will be tax deductible. In the event that you have any questions regarding these guidelines, please contact the Board of Directors for review of your fundraising activity prior to hosting fundraisers for SDSF.

We appreciate your cooperation with these guidelines and your commitment to SDSF.