



CHECKLIST FOR A PROFESSIONAL FUNDRAISING COUNSEL CONTRACT

Please attach this completed checklist to a copy of each contract and submit both documents to the Bureau of Corporations and Charitable Organizations at least **ten** working days prior to the commencement of services of the contract. A professional fundraising counsel must file with the Bureau a copy of the written contract at least ten working days prior to the performance by the professional fundraising counsel of any services with respect to the charitable organization’s soliciting contributions from Pennsylvania residents. Fill in this checklist with the contract page number and provision number/letter from which the following required information is located.

Name of Professional Fundraising Counsel: _____

Name of Charitable Organization and Certificate Number: _____

PAGE NUMBER AND PROVISION NUMBER/LETTER OF ITEM

- _____ (1) The legal name and address of the charitable organization as registered with the Bureau unless that charitable organization is exempt from registration.
- _____ (2) Statement of the charitable purpose for which the solicitation campaign is being conducted. In other words, how the contributions will be used.
- _____ (3) Statement of the respective obligations of the professional fundraising counsel and the charitable organization.
- _____ (4) Clear statement of the fees which will be paid to the professional fundraising counsel.
- _____ (5) The effective and termination dates of the contract. If no set termination date, the provision allowing either party a reasonable period to terminate the contract or notify the other party if either party chooses not to renew.
- _____ (6) The date professional fundraising counsel services are to commence with respect to the charitable organization’s solicitation of contributions in Pennsylvania.
- _____ (7) Statement that the professional fundraising counsel will not at any time have custody or control of contributions.
- _____ (8) Statement that the charitable organization exercises control and approval over the content and volume of any solicitation.
- _____ (9) Signatures of two authorized officials of the charitable organization, one of whom is a member of the organization’s governing body and a signature from an authorized contracting officer for the professional fundraising counsel.