



CHECKLIST FOR A PROFESSIONAL SOLICITOR 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 solicitor must file with the Bureau a copy of the written contract at least ten working days prior to the performance by the professional solicitor of any services with respect to the solicitation of contributions from Pennsylvania residents. Fill in this checklist with the contract page number(s) and/or provision number(s) from which the following required information is located.

Name of Professional Solicitor: _____

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 solicitor and the charitable organization

_____ (4) Statement of the guaranteed minimum percentage of the gross contributions that will be remitted to or retained by the charitable organization.

_____ (5) Statement of the percentage of the gross revenue that the professional solicitor will be compensated.

_____ (6) The date solicitation activity is to commence with respect to the solicitation of contributions in Pennsylvania.

_____ (7) 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.

_____ (8) 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 solicitor.

Attach BCO-170 or BCO-170A