



Dear The Golden Heart Fund Supporter,

Fundraisers play an important role in philanthropy at The Golden Heart Fund (“GHF”). They support and build awareness about The Golden Heart Fund. Your involvement and the collaboration of your friends will allow us to better serve our 49ers alumni and their families. Thank you for your recent inquiry regarding hosting an event to benefit The Golden Heart Fund.

The Golden Heart Fund is accountable to the public and to the IRS for fundraising activities containing our name; therefore, we ask that interested supporters complete the attached Third-Party Fundraiser application. These documents were created to educate supporters on the general steps and criteria required when coordinating a third-party event. Only third-party events that complete and submit the enclosed documents and meet the specified requirements will be considered for approval. Events are reviewed on a case-by-case basis.

After reviewing and completing the Third-Party Fundraiser application please submit to:

The Golden Heart Fund
4949 Marie P. DeBartolo Way
Santa Clara, CA 95054
E-mail: kimberly.pickup@goldenheartfund.org

On behalf of The Golden Heart Fund and our alumni and their families whose lives are impacted by the generosity of our friends, we appreciate your interest in hosting an event. Please visit www.goldenheartfund.org to learn more about us and to stay up to date on GHF news and events.

Planning a fundraiser should be fun! When hosting a third-party event benefitting The Golden Heart Fund, our staff is here to offer you support and available to make sure that your fundraiser is a success.

Here's what we can do for you:

- Provide a letter of authorization to validate the authenticity of the event and its organizers
- Provide our tax ID number, for donation purposes only
- Provide QR codes & links, for donation purposes only
- Provide and approve use of our logo, when appropriate
- Provide our boilerplate language, when appropriate
- Social Media (Twitter & Facebook) promotion, when appropriate
- Attend check presentations, when feasible
- Provide consultation on fundraisers and events (e.g. timeline, raffle items)

There are some things we can't provide:

- Our sales tax exemption number
- Insurance or liability coverage
- Mailing list of donors and/or vendors
- The Golden Heart Fund stationery
- Funding or reimbursement for your expenses
- Celebrities or professional athletes for your event
- Publicity (newspaper, radio, television, etc.)



Third-Party Event Application

EVENT ORGANIZER

Contact Name: _____
 Company/Organization: _____
 Address: _____
 City, State, Zip: _____
 Phone: _____ Email: _____

GENERAL INFORMATION

Who is organizing the event? Company Organization Individual
 When was the company/organization founded? _____
 What is the nature of your business/organization? _____

 How many employees/members in your group? _____
 Website: _____
 Reason for selecting The Golden Heart Fund as beneficiary of the event? _____

EVENT INFORMATION

Name of Event: _____
 Type of Event: _____
 Brief description of event: _____

 Date(s) and time(s): _____
 Event location/address: _____
 Target audience: _____ Expected # attendees/participants: _____
 One time event Annual event - Previous beneficiary: _____
 Will alcohol be served at the event? No Yes (liquor license)
 Do you have insurance or liability coverage? _____
 How will you be promoting your event? _____
 Will you be looking for social media from GHF and if so, how often? _____

FINANCIAL INFORMATION

How will funds be raised? Pledges Silent/Live Auction Ticket Sales Donations Gaming Other
 Projected Financial Information: Total Revenue: \$ _____ Total Expenses: \$ _____
 Anticipated donation to The Golden Heart Fund: \$ _____
 Will the proceeds be share to additional charities? If so, please list: _____



Third-Party Event Application

TERMS AND CONDITIONS

The Golden Heart Fund ("GHF") is accountable to the public and the IRS for fundraising activities conducted on our behalf. The terms and conditions below were created to educate interested supporters on the specific requirements that need to be followed to ensure legal and financial policies are honored.

LEGAL LIABILITY _____ *Initial*

1. All events require advance written permission from The Golden Heart Fund before promoting the event through any public outreach.
2. All third-party event organizers must assume in writing, legal liability for any injuries or damages involving participants or property at their event.
3. The Golden Heart Fund will not apply for liquor or gaming licenses in association with third-party events.
4. Event organizers are not permitted to host a fundraising event that includes lotteries, gambling or raffles without formal discussions with The Golden Heart Fund.
5. The organizing entity is responsible for obtaining any necessary permits, licenses, insurance, participant waivers and clearances required to host the event. Organizers must also obtain appropriate insurance (with GHF listed as co-insured) and must produce proof of compliance prior to the event.
6. The Golden Heart Fund assumes no legal or financial liability associated with the event.
7. Should circumstances warrant, The Golden Heart Fund may at any time through any of its directors, officers or senior staff direct you to cancel the event. In the event a cancellation is warranted by GHF, you hereby agree to cancel the event and release The Golden Heart Fund and its officers, directors and employees from any and all liability in connection with the event.
8. The Golden Heart Fund respects your privacy and will never sell, trade or loan your information to any other organization. Information will be used for follow-up contact (i.e. GHF newsletters, updates) and to process and acknowledge donations. We disclose your information only to GHF employees and only to accomplish the purposes listed above. By providing this information, you consent to our collection and use of the information.

BRAND MANAGEMENT _____ *Initial*

1. All events must align with the mission and appropriate image of The Golden Heart Fund, as determined by The Golden Heart Fund.
2. The Golden Heart Fund logo is a registered trademark and cannot be legally reproduced without permission.
3. The Golden Heart Fund must give approval to all promotional materials (invitations, posters, press releases, scripts etc.) and GHF name/logo usage prior to publication and/or distribution (including web/social media sites).
4. All references to The Golden Heart Fund in publicity and promotional materials for the event should refer to "The Golden Heart Fund" – specifically "EVENT XYZ to benefit The Golden Heart Fund."
5. Existing GHF partnerships shall not be used to leverage in-kind contributions, sponsorship or volunteer support for the event.
6. Event should not conflict with any existing event(s) to benefit The Golden Heart Fund.

STAFF CAPACITY _____ *Initial*

1. The Golden Heart Fund is limited in the amount of assistance it can provide to a third-party event. The event organizer must provide sufficient resources to staff, manage and operate the event. GHF may provide limited assistance to the reasonable level of available resources.
2. Due to the volume of requests received, attendance by GHF representatives are evaluated on a case by case basis; please submit your request a minimum of two weeks prior to the event.
3. The Golden Heart Fund does not provide contact information associated with its corporate partners and donors for solicitation purposes. Rather the GHF development department will work with the event organizer to promote the event to GHF supporters located within the geographic region of the event.
4. The Golden Heart Fund marketing staff will work with the event organizer to ensure that accurate information regarding The Golden Heart Fund and its programs is provided. In addition, GHF will assist with other public relations needs including video, talking points and other information.

FISCAL RESPONSIBILITY _____ *Initial*

1. Proceeds from the event must be received by The Golden Heart Fund no later than 30 days after the event.
2. Use of funds received will be determined solely by The Golden Heart Fund.
3. Events held to benefit The Golden Heart Fund are required to keep expenses at a minimum. Event organizers should budget no more than 25% of gross revenue to cover expenses.
4. Federal tax laws prohibit third-party fundraising organizations from using The Golden Heart Fund Federal Tax I.D. and 501(c)(3) status when purchasing goods or services from suppliers or vendors.
5. Only checks payable to The Golden Heart Fund will be provided with a tax-deductible acknowledgement letter in accordance with IRS and state regulations. Checks payable to the event or other source can be sent a general thank-you letter with no value attached, if participant data is provided.
6. In order to provide proper acknowledgements, the event coordinator is required to provide The Golden Heart Fund with a list of event donors including name, address, donation amount, and value of goods/services received within 30 days after the event. Please contact GHF for assistance with tracking donor information and distinguishing between cash and in-kind sponsors.
7. In accordance with IRS guidelines, all tickets, invitations or entry forms must disclose the amount of goods and services received by each participant and state the portion of the contribution that is tax-deductible. Example: "90% of all proceeds will benefit The Golden Heart Fund."
8. Event organizer is responsible for complying with all IRS regulations when planning the event.
9. Opening a bank account in the name of The Golden Heart Fund is strictly prohibited.
10. All expenses associated with hosting the event are the responsibility of the organization responsible for the event. Any invoices submitted to The Golden Heart Fund will be forwarded to the event organizer.

The undersigned has consulted with its tax and/or legal advisors about the fundraising activities and agrees to make any recommended and/or required disclosures to potential donors. The undersigned agrees to indemnify The Golden Heart Fund for any damages it may incur as the result of the undersigned's failure to comply with any applicable laws. **By signing this application, the undersigned agrees that they/he/she/it has read and agrees to the terms and conditions listed above.**

PRINTED NAME

SIGNATURE

DATE