



FORM (FT1) CHAPTER GIVING FORM

Chapter Name: _____ Date: _____
 Submitted By: _____ Email: _____
 AAC-Finance: _____ Email: _____
 Chapter President: _____ Email: _____
 Chapter Address: _____ City/ST (or Province)/Zip: _____

- ✓ **ALL CHECKS MUST be made payable to PI BETA PHI FOUNDATION.** DO NOT include Fraternity dues or contributions or checks made payable to the Fraternity or other third party.
- ✓ **ALL CHECKS MUST be dated by December 31 of each year AND MUST BE MAILED AND POSTMARKED by December 31** of each year in order to be considered for Fraternity chapter recognition (Pi, Beta or Phi) as well as Foundation Top 10. *Please note, a chapter cannot qualify for Top 10 Foundation recognition unless they have met the minimum donation requirements on the Chapter Evaluation.*
- ✓ **USE THIS FORM and, if applicable, Forms FT1-A, FT1-B or FT1-C** if you want your chapter to get the credit it deserves! Don't miss out on important recognition because you missed a form!

1. ENCLOSED IS A CHAPTER CHECK IN THE AMOUNT OF \$ _____ (include only check(s) drawn on chapter account)

2. DESIGNATE OUR CHAPTER GIFT AS FOLLOWS:

\$ _____ Friendship Fund (*Fraternity required contribution as outlined in the Chapter Evaluation: \$10 (PI); \$15 (BETA); \$30 (PHI) per member annually.*)

\$ _____ The Literacy Fund (*Fraternity required contributions as outlined in the Chapter Evaluation: Optional \$10 (PI and BETA); \$25 (PHI) per member annually.*)

*Check here to submit 25% of your Literacy Fund gift and a qualifying match from the Foundation to a local nonprofit organization working in literacy. **If checked, then Form FT1-A must be completed and enclosed.***

\$ _____ OPTIONAL OTHER GIFTS* [*please check/detail designation for all that apply*]

Emma Harper Turner Fund \$ _____

Holt House Fund \$ _____

Arrow in the Arctic/Canadian Philanthropies Fund \$ _____

The Foundation presents a number of giving options, some of which are designed for the benefit of your specific chapter, to learn more contact the Foundation staff at (636) 256 – 1357 or email fdn@pibetaphi.org:

Leadership: \$ _____

Housing: \$ _____

Literacy: \$ _____

Scholarship: \$ _____

3. ARE THESE GIFTS IN MEMORY OR RECOGNITION OF ANYONE?

No Yes *If yes, then Form FT1-B must be completed and enclosed.*

4. DO YOU ALSO HAVE CHECKS FROM OTHERS YOU WISH TO HAVE CREDITED TO YOUR CHAPTER?

No Yes *If yes, then Form FT1-C must be completed and enclosed.*

Gifts to optional funds DO NOT count toward Friendship Fund or Literacy Fund donation requirements at any level, but do count toward BETA level requirement for "Donates majority of chapter fundraising to Pi Beta Phi initiatives supported by Pi Beta Phi Foundation". For an up-to-date record of Foundation contributions, please see the Chapter Contributions Report in eReports, under the "Philanthropy" tab. **QUESTIONS? Call (636) 256–1357 or email fdn@pibetaphi.org.*

5. CONTRIBUTIONS FROM CHAPTER FUNDS REQUIRE A CHAPTER VOTE. PLEASE SELECT ONE OF THE FOLLOWING:

These dollars are proceeds of a fundraising effort (dollars raised in excess of fundraising costs).

These dollars were previously being held in the chapter's reserves fund. *Gifts of this type require Fraternity approval. To seek approval, please email Collegiate Financial Support Coordinator Brieanna Hodskins, bhodskins@pibetaphi.org.*

These dollars were not the result of a chapter fundraising effort nor were held as chapter reserves.

It is the responsibility of each chapter to ensure they have followed Fraternity fundraising and financial guidelines when making a gift to the Foundation. In some instances, chapter giving may be inadvisable. The Foundation may not accept a gift from a chapter should the Fraternity, in consultation with the Fraternity Housing Corporation (FHC), decide making the gift is not in the best interest of the chapter.

MAIL COMPLETED FORMS TO: PI BETA PHI FOUNDATION, PO BOX 801867, KANSAS CITY, MO 64180-1867



**FORM (FT1-A)
LITERACY FUND – LOCAL IMPACT GRANT
25% NOMINATION & MATCHING GIFT REQUEST**

**THIS FORM MUST ACCOMPANY FT1 and/or FT1-C FORM IN ORDER TO DISTRIBUTE
YOUR 25% NOMINATION & QUALIFY FOR MATCH**

Chapter Name: _____ Date: _____

Submitted By: _____ Email: _____

- ✓ **ONLY GIFTS TO THE LITERACY FUND** may be nominated for a local organization. Up to 25% of your literacy gift as listed on the accompanying FT1 or FT1-C form qualifies.
- ✓ **ONLY LOCAL ORGANIZATIONS** that meet the criteria outlined below are eligible to receive your gift and the Foundation match.
- ✓ **PI BETA PHI FOUNDATION** will match your nominated amount dollar for dollar to a qualified local group. Funds will be disbursed quarterly.
- ✓ **NO NOMINATIONS OR MATCHES** will be made without this form accompanying your gift at the time the gift is made. The Foundation cannot retroactively accept nominations. Only one recipient group may be nominated per FT1-A form.
- ✓ As required by the IRS and federal tax law, Pi Beta Phi Foundation retains final authority, discretion and control of all Literacy Fund grants.

1. LOCAL IMPACT GRANT NOMINATION & CALCULATION

CHAPTER GIFTS	\$ _____	(Item 2, line 2 from FT1 form)	X	25%	=	_____	NOMINATED amount
SOFT CREDIT GIFTS	\$ _____	(Item 2, line 2 from FT1-C form)	X	25%	=	_____	NOMINATED amount
						\$ _____	Total NOMINATED amount
							X 2 for FOUNDATION MATCH
						\$ _____	TOTAL REQUESTED*

2. LOCAL RECIPIENT GROUP

Check here to verify this group is a 501(c)3 organization or registered Canadian charity

We nominate the following organization to receive our Local Impact Grant:

Organization Name: _____ Contact Name: _____

Street Address: _____ City/ST (or Province)/Zip: _____

Website URL: _____ Phone: _____

Federal EIN/Canadian BN: _____ (available from organization or at www.guidestar.org)

Mission Statement or Program Information Specific to Literacy: _____

*LOCAL IMPACT GRANTS are distributed quarterly and recipient group information will be independently verified by Foundation staff prior to disbursement. You will be notified in writing in the unlikely event that the Foundation is unable to accept your nomination for this Local Impact Grant. **QUESTIONS?** Call (636) 256-1357 or email fdn@pibetaphi.org.

TO BE INCLUDED WITH COMPLETED FT1 and/or FT1-C FORM.



FORM (FT1-B) MEMORIAL & RECOGNITION FORM

Chapter Name: _____ Date: _____

Submitted By: _____ Email: _____

- ✓ **ANY GIFT** to Pi Beta Phi Foundation may be made in honor or memory of an individual.
- ✓ **SUBMIT** this completed form with your gift and Pi Beta Phi Foundation will send a memorial/recognition card as indicated to the honoree(s) or their family members notifying them of your thoughtful gift.

1. This gift is made in memory/recognition (circle) of:

Name: _____ Chapter/Initiation Year if applicable: _____

Please notify:

Name: _____ Chapter/Initiation Year if applicable: _____

Mailing Address: _____ City/ST (or Province)/Zip: _____

2. This gift is made in memory/recognition (circle) of:

Name: _____ Chapter/Initiation Year if applicable: _____

Please notify:

Name: _____ Chapter/Initiation Year if applicable: _____

Mailing Address: _____ City/ST (or Province)/Zip: _____

3. This gift is made in memory/recognition (circle) of:

Name: _____ Chapter/Initiation Year if applicable: _____

Please notify:

Name: _____ Chapter/Initiation Year if applicable: _____

Mailing Address: _____ City/ST (or Province)/Zip: _____

4. This gift is made in memory/recognition (circle) of:

Name: _____ Chapter/Initiation Year if applicable: _____

Please notify:

Name: _____ Chapter/Initiation Year if applicable: _____

Mailing Address: _____ City/ST (or Province)/Zip: _____

5. This gift is made in memory/recognition (circle) of:

Name: _____ Chapter/Initiation Year if applicable: _____

Please notify:

Name: _____ Chapter/Initiation Year if applicable: _____

Mailing Address: _____ City/ST (or Province)/Zip: _____

QUESTIONS? Call (636) 256-1357 or email fndn@pibetaphi.org.

TO BE INCLUDED WITH COMPLETED FT1 FORM.



FORM (FT1-C) SOFT CREDIT CHAPTER GIVING FORM

Chapter Name: _____ Date: _____

Submitted By: _____ Email: _____

AAC-Finance: _____ Email: _____

- ✓ **Soft credits are checks from individuals, businesses or other fraternal organizations other than your Pi Beta Phi chapter.** Your chapter can receive credit for these gifts on the Fraternity Chapter Evaluation and in Top 10 calculations by completing this form.
- ✓ **ALL CHECKS MUST be made payable to PI BETA PHI FOUNDATION.** DO NOT include Fraternity dues or contributions or checks made payable to the Fraternity or other third party.
- ✓ **ALL CHECKS MUST be dated by December 31 of each year AND MUST BE MAILED AND POSTMARKED by December 31** of each year in order to be considered for Fraternity chapter recognition (Pi, Beta or Phi) as well as Foundation Top 10. *Please note, a chapter cannot qualify for Top 10 Foundation recognition unless they have met the minimum donation requirements on the Chapter Evaluation.*
- ✓ **This form must accompany all checks submitted to Pi Beta Phi Foundation for soft credit to your chapter.** Sorry, no form, no credit.

1. **ENCLOSED ARE CHECKS TOTALING \$** _____ *(ALL checks must be made payable to Pi Beta Phi Foundation)*

2. **CHOOSE ONE DESIGNATION FOR THESE GIFTS:** *(Only one designation per batch of soft credit checks, please. You may submit multiple FT1-C forms so long as you divide/batch your soft credit checks to match each FT1-C form)*

\$ _____ Friendship Fund

\$ _____ The Literacy Fund

*Check here to submit 25% of your Literacy Fund gift and a qualifying match from the Foundation to a local nonprofit organization working in literacy. **If checked, then Form FT1-A must be completed and enclosed.***

\$ _____ OTHER GIFTS* *[please check/detail designation for all that apply]*

- Emma Harper Turner Fund \$ _____
- Holt House Fund \$ _____
- Undergraduate Scholarship Fund \$ _____
- Graduate Fellowship Fund \$ _____
- Alumnae Continuing Education Scholarship Fund \$ _____
- Arrow in the Arctic/Canadian Philanthropies Fund \$ _____

3. **ARE THESE GIFTS IN MEMORY OR RECOGNITION OF ANYONE?**

No Yes *If yes, then **Form FT1-B must be completed and enclosed.***

4. **BY SUBMITTING THIS FORM, YOU AFFIRM that you did not provide the donors who made the enclosed donations any goods or services, and/or that such goods and services provided meet the token or insubstantial exemption as defined by the IRS Rules of Substantiation.** *(See IRS Publication 1771, available at <http://www.irs.gov/pub/irs-pdf/p1771.pdf>)*

Printed Name: _____ Chapter Office: _____

Signature: _____ Date: _____

* Gifts to optional funds DO NOT count toward Friendship Fund or Literacy Fund donation requirements at any level, but do count toward BETA level requirement for "Donates majority of chapter fundraising to Pi Beta Phi initiatives supported by Pi Beta Phi Foundation". For an up-to-date record of Foundation contributions, please see the Chapter Contributions Report in eReports, under the "Philanthropy" tab. **QUESTIONS?** Call (636) 256-1357 or email fdn@pibetaphi.org.

Mail completed forms to: Pi Beta Phi Foundation, PO Box 801867, Kansas City, MO 64180-1867.