TAX-DEDUCTIBLE DONATION INTAKE FORM

Through the Cooperative Development Fund of CDS

FOR THE BENEFIT OF: _____

1. DONOR INFORMATION

Donor Name: _____

Organization (if applicable): _____

Mailing Address: _____

_____

Phone: _____

Email: _____

2. DONATION INFORMATION

Date: _____

Donation Amount (estimated if non-cash): $_____

Donation Type (check one):

- ☐ Check
- ☐ Credit Card (GiveMN)
- ☐ PayPal
- ☐ Venmo
- ☐ Donor Advised Fund (DAF)
- ☐ Qualified Charitable Distribution (QCD)
- ☐ Required Minimum Distribution (RMD)
- ☐ Publicly Traded Stock
- ☐ Company Match
- ☐ Other: _____

3. DESIGNATION

This donation is intended:

☐ For the benefit of _____
Cooperative Grocery Store

Project or campaign (if applicable):

_____

_____

(Examples: Building Fund, Working Capital, Community Health Initiative, Equipment, General Support)

4. PAYMENT DETAILS

If paying by check:

Check Number: _____

Payable to:

☐ Cooperative Development Fund of CDS

Memo line includes co-op name?

☐ Yes ☐ No

How did the donor hear about this fundraising opportunity?

- ☐ Website
- ☐ Facebook
- ☐ Email
- ☐ Event
- ☐ Friend
- ☐ Board Member
- ☐ Other: _____

5. ADDITIONAL DONATION DETAILS (If applicable)

DAF / STOCK / QCD / RMD

Financial Institution:

_____

Advisor/Broker Name:

_____

Advisor Phone/Email:

_____

Has donor been provided transfer instructions?

☐ Yes ☐ No

Additional follow-up needed?

☐ Yes ☐ No

Notes:

_____

_____

_____

COMPANY MATCH

Employer: _____

Will employer match donation?

☐ Yes ☐ No ☐ Unknown

Matching company instructions received?

☐ Yes ☐ No

RECOGNITION

May we publicly recognize this donor?

☐ Yes ☐ No

Preferred recognition name:

_____

ACKNOWLEDGEMENT

- ☐ Tax receipt will come from the Cooperative Development Fund of CDS, not the co-op.
- ☐ Donation is designated for the benefit of the cooperative grocery store.
- ☐ For donations of $250 or more, the fiscal sponsor will provide the required tax acknowledgement.

6. INTERNAL USE ONLY

Date received: _____

Received by: _____

Donation forwarded to CDS:

Date: _____

Batch #: _____

Amount Sent: $_____

Donor included on batch report emailed to CDS?

☐ Yes ☐ No

Notes:

_____

Reviewed by: _____

Date: _____

CDS acknowledgement received for checks $250+?

☐ Yes ☐ No