

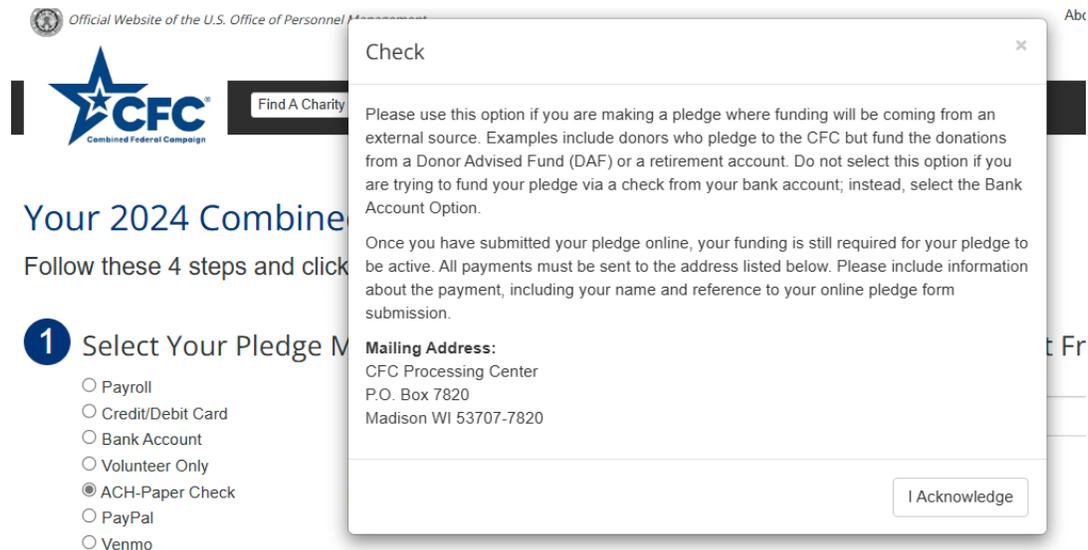
# Funding a CFC Donation from a Third-Party Financial Institution

**Purpose:** The purpose of this document is to describe the process for making a CFC donation where the funds from your donation come directly to the CFC from a Third-Party Financial Institution (such as individual retirement accounts, pension plan, donor advised funds or other similar accounts).

**Process:** Donors can make pledges both through the CFC online pledging system or a paper pledge form. Separately, the funds for the accompanying donation must be sent to the CFC Processing Center to be linked to their pledge.

## 1. Online pledge:

- a. To complete an online pledge a donor will login to the CFC Pledge System and select the charities they wish to pledge to.
- b. Once the donor goes wishes to complete the pledge and checks out, they will see a payment method available called ACH-Paper Check



- c. Upon selecting this option an information module will appear providing additional detail around the payment source and an address where funds can be sent.
- d. After making this selection, the donor will continue to finish their pledge checkout the same way as any other pledge.

## 2. Paper pledge:

- a. To complete a paper pledge, a donor must fill out a paper pledge form via the standard paper pledging process. Paper pledge forms can be found at this link: <https://givecfc.org/pledgeform>

- b. NOTE: the current paper pledge form does not include a separate option to note the pledge funding source will be coming from a third-party financial institution. As such, select Check as the allotment source.
- c. In addition to the paper pledge form, donors must submit an additional note with the pledge form indicating that funding will be sent by their Third-Party institution and provide the name of that institution.

### **3. Funding the Pledge:**

- a. Once a pledge form is submitted either online or via paper, donors must work with their Third-Party financial institution to send the funding that matches their gift.
- b. The CFC Processing Center can handle multiple fund transfer methods, including PayPal grants, bequests, ACH, bank wires, stock transfers and paper checks. Historically, paper check has been the most common option.
  - i. Paper Check: Paper checks should be mailed to the address below. They should include as much information about the donor's pledge as possible either via the check memo field or cover letter accompanying the funds.
    - 1. At a minimum, the funds need to include reference to the donor's name and reference to the CFC. If possible, we also encourage information about the charity/CFC code from the donor's pledge form and reference the funding is being sent separately from the pledge form.
    - 2. Address: CFC Processing Center
      - i. P.O. Box 7820
      - ii. Madison, WI 53707-7820
  - ii. Electronic Funds Transfer: Currently, there are multiple electronic funding methods supported. Since financial institutions process electronic fund transfer differently, we prefer to handle the transfer on a case-by-case basis and will work with the donor independently to support the payment transfer.
    - 1. For assistance making an electronic payment please have the donor email: [chris.fischer@tasconline.com](mailto:chris.fischer@tasconline.com) and [mary.rowens@tasconline.com](mailto:mary.rowens@tasconline.com)