

## Charitable Beneficiary Information / Relatedness Form

*Please provide the following information substantiating the charitable beneficiary's relatedness to a Presbyterian entity.*

Date: \_\_\_\_\_

Charitable Beneficiary Name: \_\_\_\_\_

Address: \_\_\_\_\_

City

State

Zip

Tax Identification Number: \_\_\_\_\_ Website: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Contact e-mail: \_\_\_\_\_

Who is the validating organization? \_\_\_\_\_

*Please check the appropriate relatedness category for the charitable beneficiary and provide the requested documentation for the category indicated. This documentation is necessary for the Foundation to accept or hold a gift designated for the organization.*

\_\_\_\_\_ **Presbyterian-Related Organization by Governance** are those organizations in which a governing body of the Presbyterian Church (USA) holds appointive power for one or more seats on the organization's governing board.

1. A copy of the organization's 501(c)(3) determination letter; and
2. A copy of the Articles of Incorporation or Bylaws of the organization indicating the Presbyterian Church (USA)'s appointive power for one or more seats on the organization's governing board.

\_\_\_\_\_ **Presbyterian-Related Organization by Validated Mission** is any project or program of an organization within the bounds of and approved by formal action of a session, presbytery, synod or the General Assembly of the Presbyterian Church (USA) ("validating organization") that is consistent with the responsibilities assigned by the Form of Government, whether or not it is funded from the adopted budget of the governing body. Each and all governing bodies serve the mission of the whole church and thereby may appropriately validate missions.

1. A copy of the validated organization's 501(c)(3) determination letter; and
2. The validating organization must provide one of the following three items:
  - a. A copy of the resolution passed by the Presbyterian governing body stating that the organization is a validated mission of that governing body and is endorsed to the public as an appropriate extension of the mission and ministry of that governing body.
  - b. A copy of the adopted budget (including contingent or "extra commitment" provisions) of the subject governing body indicating the formal allocations of the funds for the validated mission organization and evidence that the budget was the officially adopted budget for the year indicated.
  - c. A letter signed by the Treasurer and an Elder substantiating that the organization is a validated mission of or is supported by that governing body.

**The completed form and documentation can be sent via facsimile (502-805-0466) to: Operations Department, Administrative Services. For assistance, contact Client Services at 800-858-6127.**