

2012 CSECC PLEDGE FORM "CHEAT SHEET"

Top Portion of the Pledge Form

NEW PAYROLL DEDUCTION (Item A)

New payroll deduction donors must:

- Provide your SSN in box 1 (**REQUIRED**)
- Select item A
- Fill in boxes 6 & 7
- Sign and date on line F
- **OPTIONAL:** If donor would like to direct their gift to a specific nonprofit(s) complete Section I. Sign and date on line K.
- **NOTE:** Box 5 should be marked **XXX** as this donor would not be currently participating through payroll deduction.

CHANGE MY EXISTING DEDUCTION (Item B)

Existing payroll deduction donors who would like to change their monthly contribution must:

- Provide your SSN in box 1 (**REQUIRED**)
- Select item B
- Fill in box 8
- Sign and date on Line F
- **OPTIONAL:** If donor would like to direct their gift to a specific nonprofit(s) complete Section I. Sign and date on line K
- **NOTE:** Selecting this option **CANCELS** your existing deduction and contribution to your selected charitable organizations. To re-designate, please complete section I below. Sign and date on line K

DELETE (Item C)

Existing payroll deduction donors who would like to stop contributing must:

- Provide your SSN in box 1 (**REQUIRED**)
- Select item C
- Sign and date on line F

CHANGE MY PCFD (Item D)

Existing payroll deduction donors who would like to change the PCFD Agency managing your deduction must:

- Provide your SSN in box 1 (**REQUIRED**)
- Select item D
- Fill in boxes 9 & 10
- Sign and date on line F
- **OPTIONAL:** If donor would like to direct their gift to a specific nonprofit(s) complete Section I. Sign and date on line K
- **NOTE:** Selecting this option **CANCELS** your existing deduction and contribution to your selected charitable organizations. To re-designate, please complete section I below. Sign and date on line K

CONTINUE MY EXISTING DEDUCTION (Item E)

Existing payroll deduction donors who would like to continue their existing deduction and have **NO** changes should select item E and sign & date line F.

NOTE: No SSN or signature is required to continue an existing deduction and a designation. If the donor wishes to change their designation, Section I must be completed and SSN is needed. Sign and date on line K.

ONE-TIME CONTRIBUTIONS (Item G)

Employees who are not making a payroll deduction but providing a "one-time gift" must:

- Select item G
 - Encourage the use of checks for security and record-keeping purposes. A cash or check gift must be accompanied with a completed Pledge Form. If the donation is designated to a specific nonprofit, the donor must complete Item I and sign and date on line K
- All checks must be written out to the CSECC for processing and legal purposes, whether the gift is designated or not
- If a cash gift is made, enclose the cash in a sealed envelope and have the donor sign on the envelope seal

DECLINE, NOT INTERESTED AT THIS TIME (Item H)

Employees who do not wish to participate in the campaign & are not currently donating should check Box H and initial.

Bottom Portion of the Pledge Form (OPTIONAL)

I WISH TO MAKE THE FOLLOWING DESIGNATIONS (Section I)

Donors wishing to designate to a specific nonprofit(s) must

- Enter Organization Name and Code
- Enter Amount per Month (minimum \$5.00 per month for each designation)
- Enter Total of ALL Monthly Designations
- Sign and date on line K

Donors wishing to designate to a nonprofit not listed in the Donor Resource Guide must complete the "Write-In Organization Information" section of the form and include:

- Enter Organization Name & Address
- Enter Organization City, State and Zip Code
- Enter Amount per Month (minimum \$5.00 per month for each designation)
- Enter Total of ALL Monthly Designations
- Sign and date Line K

NOTE: "Total ALL Monthly Designations" must be equal to or less than the "Total Monthly Contribution" amount on the top half of the pledge form.

ACKNOWLEDGEMENT (Item J)

Donors wishing to be acknowledged for their gift must annually complete item J. In an effort to reduce costs an email address is preferred by the PCFD Agency. Designated nonprofit(s) will receive the donor's name and address but may or may not send acknowledgement.

FYI: The pledge form serves 2 purposes. The top portion of the pledge form authorizes the State Controller's Office to withdraw or cease a deduction. The bottom portion is for the PCFD to pay out designations. Any undesignated portion will be invested in local programs and services by the PCFD managing your funds.