

**NTAF***The Leader in Fundraising Assistance and Support
for Transplant and Catastrophic Injury*

150 N. Radnor Chester Road, Suite F-120, Radnor, PA 19087 • 1.800.642.8399 • 610.535.6106 (fax) • www.NTAFund.org

INTERNAL REVENUE SERVICE & STATE DISCLOSURE RULES

**Please copy this sheet and give to all appropriate fundraising volunteers.
Encourage anyone to call NTAF if they have questions.**

1. The IRS requires YOU to write the following paragraph on ALL printed materials advertising your fundraising events:

Contributions are tax-deductible to the extent allowed by the law. This campaign is administered by the National Transplant Assistance Fund, a 501(c)(3) nonprofit providing fundraising assistance to transplant and catastrophic injury patients. Information: 800-642-8399.

- Contributors to your campaign will appreciate knowing that your fundraising efforts are legal and that fiscal accountability is provided by a nonprofit organization.

2. A number of states require YOU to place solicitation disclosure statements on ALL written materials mailed from their state to potential donors nationwide. These states and their required language/specifications are listed below. If fundraising is not originated within one of these states, no additional disclosure (outside of the IRS statement) is required.

Florida

The following verbatim disclosure must be conspicuously displayed, IN CAPITAL LETTERS, and included on all fundraising materials sent to Florida residents. The disclosure statement must also include Florida's registration number CH296. The statute states that when the solicitation consists of more than one piece, "the statement must be displayed prominently" in the materials.

- A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE, WITHIN THE STATE, 1-800-HELP-FLA. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. FLORIDA'S REGISTRATION NUMBER CH296.

Maryland

According to the statute, the statement must be conspicuously displayed on any written or printed solicitation.

- "A copy of the current financial statement of the National Transplant Assistance Fund is available by writing 150 N. Radnor Chester Rd, Suite F-120, Radnor, PA 19087 or by calling 800-642-8399. Documents and information submitted under the Maryland Solicitations Act are also available, for the cost of postage and copies, from the Maryland Secretary of State, State House, Annapolis, MD 21401. (410) 974-5534."

Michigan

No disclosure statement required. However, the Attorney General's office strongly encourages inclusion of the organization's Michigan registration number in all solicitations written as: "MICS No. 11575."

Mississippi

For Mississippi solicitations, the following statement must be reproduced verbatim on written solicitations, confirmations, receipts and reminders of oral solicitations.

- "The official registration and financial information of National Transplant Assistance Fund, Inc. may be obtained from the Mississippi Secretary of State's office by calling 1-888-236-6167. Registration by the Secretary of State does not imply endorsement."

(please see next page)

New Jersey

For New Jersey, any printed solicitation, written confirmation, receipt or written reminder of a contribution must include the following:

- “Information filed with the Attorney General concerning this charitable solicitation may be obtained from the Attorney General of the State of New Jersey by calling 973-504-6262. Registration with the Attorney General does not imply endorsement.”

New York

The disclosure must be placed conspicuously in the materials with print no smaller than 10 point bold face type or, alternatively, no smaller than the size print used for the most number of words in the solicitation.”

- **“A copy of the latest annual report can be obtained from the organization or from the office of the Attorney General by writing the Charities Bureau, 120 Broadway, New York, NY 10271.”**

North Carolina

For North Carolina, every charitable organization or sponsor that is required to obtain a license shall conspicuously display the following statement on every printed solicitation, written confirmation, receipt or reminder of a contribution. The statement printed in 9 point type should be made conspicuous by one of the following: a border, underlining, or bold type.

- **“Financial information about this organization and a copy of its license are available from the State Solicitation Licensing Branch at 1-888-830-4989. The license is not an endorsement by the state.”**

Pennsylvania

The following must be reproduced verbatim and “conspicuously printed”:

- A copy of the official registration and financial information of the National Transplant Assistance Fund, Inc. may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.

Virginia

For Virginia, although required by law only of Professional Solicitors, the Office of Consumer Affairs is requesting all nonprofits to include a disclosure stating that:

- “Financial statements are available from the State Division of Consumer Affairs, P.O. Box 1163, Richmond, VA 23218.”

Washington

For Washington, solicitations must state that the charity is registered with the Secretary of State, and that:

- “Information relating to the financial affairs of National Transplant Assistance Fund, Inc. is available from the Secretary of State, and the toll-free number for Washington residents is 1-800-332-4483.”

West Virginia

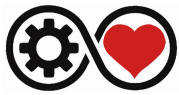
For West Virginia, the following statement must be conspicuously displayed:

- “West Virginia residents may obtain a summary of the registration and financial documents from the Secretary of State, State Capitol, Charleston, WV 25305. Registration does not imply endorsement.”

3. IRS Charitable Donation Requirement

Effective January 1, 1994, fundraising organizers must provide written statements to donors who give **more than \$75.00** and receive something of value in return, (i.e., dinner dance, golf tournament, concert, etc.). This statement must define what portion of the cost of the event or item is tax-deductible. This should be printed on the ticket or invitation for your event.

- Example: If a Dinner Dance ticket is \$100 and the actual cost for the event including food/entertainment/rental, etc. is \$40, the remaining \$60 would be tax-deductible. For example, you would print: **“Ticket Cost \$100 (tax-deductible \$60).”**

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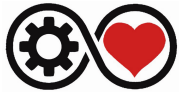
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TIPS TO EASE TRANSPLANT EXPENSES

If you or someone you know is a transplant candidate, the following tips may help you assess your financial status and prepare for a fundraising campaign.

- Check insurance coverage. Whether coverage is through a private policy, HMO, Medicare or Medicaid, you need to know if the transplant and medications are covered, what percentage of the cost will be paid, and whether there is a lifetime limit on coverage. Often it is necessary to call the insurance company or their representative.
- Find the threshold amount. This is the amount of money needed before a patient can be placed on the waiting list for a particular transplant. Though it varies depending on the organ and hospital, the figure should be available from the medical center's transplant coordinator. A coordinator should also tell you if there is a gap between the available insurance and the threshold amount.
- Assemble volunteers. A fundraising drive requires as many volunteers as possible. It is helpful to designate one person as a coordinator of the campaign in order to act as a contact person and to oversee others' efforts.
- Assess your community. Some areas respond to barbecue and spaghetti suppers, others to golf outings and benefit performances. Look around at the type of activities that seem popular in your community. Find out if employers in your area match donations by employees and whether there are businesses that participate in fundraising efforts. Do not hesitate to approach as many local organizations as you can think of such as Rotary Clubs, American Legion Posts, Masons, VFW Posts, Thrivent Financial, police and firefighter organizations, garden clubs, schools and churches.
- Establish a fundraising campaign. By setting up a campaign with a nonprofit organization such as NTAF, donations will be tax-exempt and donors may be assured of fiscal accountability. In addition, you may be eligible for donations through the employee matching gift programs at many large companies.

For assistance with any of the above information, or should you have any questions, please contact NTAF – The Leader in Fundraising Assistance and Support for Transplant and Catastrophic Injury at 1-800-642-8399.

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NTAF ASSOCIATES WHO SERVE AS PATIENT FUND REFERENCES

These individuals are available to you as references for NTAF. You may call or email anyone on this list.

Northeast Region

Michelle Chadwick
(friend/fundraiser for
lung patient)
Manchester, NH 03104
603-232-7662 (home)
michelle.chadwick@hitchcock.org

Terri Kay
(daughter/fundraiser for
small bowel patient)
Salem, MA 01970
978-744-2235 (home)

Kim Vieira
(friend/fundraiser for
lung/kidney patient)
Kennebunk, ME 04043
207-408-5407 (Cell)
kvieira@roadrunner.com

New York Region

Bill Haglund
(volunteer)
Warwick, NY 10990
845-986-7708 NY (home)
910-579-3104 NC (home)
chief49@aol.com

Colleen Kelly
(friend/fundraiser for
spinal cord injury patient)
Chappaqua, NY 10514
914-762-9372 (home)

Mid-Atlantic Region

Dean Diehl
(father of liver patient)
West Chester, PA 19382
610-431-4614 (home)

Mary Beth Kelly
(mother of lung patient)
Reading, PA 19608
610-927-2575 (home)
610-288-3424
kellym@thehighlands.org

Richard Koper
(kidney patient)
Oakdale, PA 15071
412-787-3987 (home)

David Lee
(lung patient)
Yardley, PA 19067
215-369-8545 (home)
215-901-6782 (cell)
david@breakthrupictures.com

Marcy Leger
(aunt of spinal cord injury
patient)
North Caldwell, NJ 07006
973-228-1785 (home)
marcyleger@earthlink.net

Isaac Rose
(husband of liver patient)
Charleston, WV 25306
304-925-6352 (home)

Jay R. Shotel
(father of bone marrow patient)
Gaithersburg, MD 20878-2539
301-279-2113 (home)
301-633-8012 (cell)
jshotel@gwu.edu

South Atlantic Region

Chris Beale
(father of spinal cord injury
patient)
Glen Allen, VA 23059
804-521-8940 (work)

Tammy Hart
(stem cell patient)
Nashville, TN 37221
615-500-7995 (home)

Karen McCoon
(stem cell patient)
Irmo, SC 29063
803-234-4835 (home)
stemcellkaren@yahoo.com

Charlie Murray
(lung patient)
Ladsen, SC 29456
843-696-2535 (cell)
843-797-1467 (home)

Trish and Phil Rancer
(parents of bone marrow
patient)
High Point, NC 27265
336-382-9458 (Phil)
336-462-4494 (Trish)
trancer@triad.rr.com
prancer@triad.rr.com

Paula Carmichael Schupp
(daughter of liver patient)
Winston Salem, NC 27103
336-575-1513 (cell)
sweetp3279@yahoo.com

Phil Taylor
(father of kidney patient)
Raleigh, NC 27612
919-325-0755 (home)
800-681-9860 (work)
vicarphil@free-episcopal.org

Southeast Region

Prakash Madhavaiya
(father of spinal cord injury patient)
Atlanta, GA 30339
704-907-6160 (cell)
prakoos@gmail.com

Carolyn Palko
(wife of lung patient)
Orlando, FL 32801
407-352-1213 (home)
Carolynp0807@aol.com

P.J. Ray
(wife of lung patient)
Jacksonville, FL 32244
904-777-5177 (home)
pray43brownsugar@aol.com

Great Lakes Region

Tim Francisco
(lung patient)
East Lansing, MI 48823
517-203-1783 (home)

Gordon Medema
(liver patient)
Alto, MI 49302
616-656-5544 (home)

Lori Metott
(wife of kidney patient)
Waterford, MI 48327
248-682-6075 (home)

Missy Tague Bucher
(multi-visceral patient)
Fishers, IN 46038
317-578-1248 (home)
missybucher@yahoo.com

North Central Region

Melanie Coats
(mother of kidney patient)
Evergreen Park, IL 60805
773-298-8944 (cell)
melaniecoats@yahoo.com

Helen Dunn
(bone marrow patient)
Chicago, IL 60707
312-446-0007 (cell)
Hdunn17334@aol.com

Tina Lemon
(wife of kidney/pancreas patient)
Minot, ND 58701
701-838-9601 (home)

Sheri Rolfe
(sister/donor for kidney patient)
Hilton Head Island, SC 29926
843-227-1839 (home)
srolfe@hargray.com

Midwest/West Region

Susan Jasin
(mother of liver patient)
Lake Saint Louis, MO 63367
636-561-0144 (home)
susanjasin@gmail.com

Heather Johnson
(mother of bone marrow patient)
Colorado Springs, CO 80906
719-527-7833 (home)
heather@johnsondds.com

Tom Moninger
(father of spinal cord injury patient)
Broomfield, CO 80020
303-466-4010 (home)
303-460-5456 (work)
flford@comcast.net

John and Madelyn Senk
(liver patient and wife)
Kansas City, MO 64119
vfwag@yahoo.com

South Central Region

Preston Walker
(stem cell patient)
Hudson Oaks, TX 76087
Pwalker2644@sbcglobal.net

Marilyn M. Cooklin
(liver patient)
Oologah, OK 74053
918-232-7822 (cell)
mcooklin@gmail.com

Northwest Region

Don and Sherry Cotant
(lung patient and wife)
Pocatello, ID 83204
Newlife1205@hotmail.com

Lavaun Heaster
(kidney patient)
Portland, OR 97215
503-231-1052 (home)
lavaunh@yahoo.com

Lisa and Gordy Johnson
(parents of spinal cord injury patient)
Damascus, OR 97089
503-658-4929 (home)
lisagordy@comcast.net

Southwest Region

Carla Brauer
(lung patient)
Las Vegas, NV 89123
702-616-9289 (home)

Julie Drinkard
(sister/donor for stem cell patient)
Flagstaff, AZ 86004
928-526-9591 (home)
steelerbabe7@hotmail.com

Sue George
(fundraiser for spinal cord injury patient)
Flagstaff, AZ 86004
928-526-3949 (work)

Lori Gomez
(wife of bone marrow patient)
Hanford, CA 93230
559-585-1936 (home)
559-707-1478 (cell)

Jennifer Kayler
(mother of spinal cord injury patient)
San Diego, CA 92131
jenniferkayler@yahoo.com

Susan Norman
(friend of spinal cord injury patient)
South Lake Tahoe, CA 96158
530-400-9888 (cell)

Mike St. John
(liver patient)
Tucson, AZ 85728
520-909-8070 (cell)

Michael Slaby
(husband of heart patient)
San Clemente, CA 92673
949-366-9292 (home)
714-639-7873 x202 (work)
949-291-7915 (cell)

NTAF is a member of the following professional organizations:
Coalition on Donation
National Spinal Cord Injury Association
North American Transplant Coordinators
Organization, NATCO
Society of Transplant Social Workers
Transplant Financial Coordinators Association
United Network for Organ Sharing, UNOS

NTAF has received the highest possible rating from the following industry evaluators:

BBB Wisegiving Alliance
Charity Navigator
Independent Charities of America

NTAF participates in the National Combined Federal Campaign, CFC#12095

Other References:

Commonwealth of Pennsylvania
Dept. of State; Bureau of Charitable Organizations
Harrisburg, PA 17120
800-732-0999

Better Business Bureau of Eastern PA
Ste. 600, 1608 Walnut Street
Philadelphia, PA 19103-2297
215-985-9313