Thank you for thoroughly completing the Network for Good Sub-licensee on- boarding documentation! There are two phases to this process. The first phase requires a minimum of **3 weeks to set up credentials**, test, and establish financials. The second invoicing phase kicks off about a week into phase one. Depending on the sub-licensee's desired method of payment of applicable NFG invoices, please allow **3-4 weeks for this invoicing phase**. These phases should take somewhere between 4 and 6 weeks leading up to pre-launch confirmation.

Account Detail

- Confirm Time-frame
- Provide Account Details
- Specify Fundraising Solution

Licensee name	
Expected launch date	
Client giving program name(s) (IE. AT&T Employee Giving, AT&T Matching Gifts)	Campaign name and description
*Accounting contact: Name, Address, Email & Phone	For invoicing of TPCs/cred fees

*Contact will receive the invoice directly from NFG and is responsible for arranging payment.

Network for Good corporate fundraising solutions services. Please indicate at least one service:

NFG Fundraising Solutions	☐ Credit Card ☐ Matching Gifts ☐ Payroll

Internal Use Only

Sandbox Partner Source: Partner ID: Partner Password: Partner Campaign:	Production Partner Source: Partner ID: Partner Password: Partner Campaign:

TRANSACTION PROCESSING COST (TPC) DETAILS

- Specify Fee Structure
- Determine reserve balance and threshold, if applicable
- Indicate payment method

Indicate NFG Solution and Credit Card fee structure:
"client covers fees," – Client pays fees on behalf of donor/employee
"deduct fees from the donation" – Fees are deducted from the donation

NFG Fundraising Solution	
Credit Card Fee	4.75%
Fee Structure The client will either pass the fee onto the donor or cover it – see below for details if the clients chooses to cover fees	☐ client covers fees ☐ deduct fees from the donation
Batch Disbursement Fee	2.25%
Fee Structure	☐ client covers fees (invoiced) ☐ deduct fees from the donation

If the sub-licensee elects to cover all Credit Card fee, they will need to establish a pre-funded "Credit Card TPC Reserve." This reserve must be funded before your launch date and before transacting live Credit Card donations.

Regular Monthly Reserve	$
Giving Season Reserve (Oct. – Dec.)	$
Replenishment Threshold	$

Note: NFG's standard for credit card fees reserve accounts is $2,000 with a $1,000 threshold. However, needs vary depending on the expected donation volume. Once the client reaches a predetermined threshold, an invoice is sent to replenish the reserve.
Note: Matching, payroll, batch disbursement services cannot be funded using batch reverse funds. All Invoices are due upon receipt.

Payment must be received by the last business day of the month to ensure disbursements happen on the 15th of the following month. Same-day wire payments can be sent on the last business day of the month. ACH payments must be sent 3 – 4 days before the last business day of the month to ensure payment is credited:

- Acceptable payment type: **Check, ACH, or Wire**
- If applicable, please include PO#, Invoice Detail Requirements, or special instructions
- If applicable, please include necessary enrollment documents or requests for information to complete ACH/Wire Setup

Payment type	Special instructions	Requests for financial information
	For wire/ach payments partners will often provide wire/ach authorization forms to instruct their bank to TPC send to NFG BOA account	

Internal Use Only

Partner = Partner Campaign = Amount % = 2.25% Amount $ = n/a Fee Coverage = Fee Allocation: 2.25% NFG, 0% Partner Tip: not allowed Tip Allocation: n/a	Partner = Partner Campaign = Amount % = 4.75% Amount $ = n/a Fee Coverage = Fee Allocation: 4.75% NFG, 0% Partner Tip: not allowed Tip Allocation: n/a

Pre-launch API Confirmation (one week before Launch date)

- Confirmed Launch Date
- Finalize Donation Confirmation Receipt Language
- Grant Partner Portal Access

Provide contact information to create the sub-licensee contact record and grant the relationship manager(s) access to the NFG Partner Portal. After pre-launch confirmation, the client will be able to view transaction information, invoice detail, and more through the NFG Partner Portal.

Customer Success Manager Name or Team, Email, and Phone	GivePulse tier two support info
Donor Support Email & Phone	GivePulse Donor Support, If applicable – networkfrogood.com/support/donor, by default
Client Contact name(s) and email to access Partner Portal	You may disregard for now

Note: NFG Customer Solutions will field transaction and disbursement related inquiries from both donors and nonprofits, but we also get questions about a company's program parameters or pending donations. In these cases, we will forward inquiries or refer donors to the sub-licensee.

See template confirmation/receipt on the next page. Please refer to merge fields in red only for customization. Information will appear on the donation confirmations and receipts exactly as written below:

Company Name	All below is for the receipt the donor receives
Company Email	
Optional Customized Text *see below	
Site Link for donor security and privacy information *default: networkforgood.org/privacy	

DONATION RECEIPT TEMPLATE

From: donations@networkforgood.org [mailto:donations@networkforgood.org]
Sent: <date>
To: <Donor Name>
Subject: Thank you for donating through **< your giving program name >**

Dear <First Name>,

On behalf of your favorite charities and **< your company name >,** we thank you for your generous support!

Your donation is being made to Network for Good, a nonprofit, donor advised fund (tax ID 68-0480736), which processes donations made through **< your company name >** and distributes them to your chosen charity(ies). Depending on your method of payment, your credit card or PayPal statement will show 'Network for Good' or the charity(ies) to which you donated. All donations are final and may not be refunded. Details of your donation are listed in the Donation Record below.

Thank you again for visiting **< your company name >**

DONATION RECORD

Your contribution is tax-deductible to the extent allowed by law. You may save or print this receipt for your records. This email certifies that you have made this donation as a charitable contribution and you are not receiving any goods or services in return. This receipt may be useful to you when completing your tax return.

Name:
Address:
City:
State/Province:
Zip/Postal Code:
E-mail:
Phone:

Total Donation Amount: $
Method of Payment:
Name on Credit Card:
Credit Card Last 4 Digits:
Date:
Time:
Reference Number:
Authorization:
Authorization Code:

Nonprofit Organization:
Address:
Designated Project:
Dedication:
Donation Amount: $

The above information relating to you, the donor, is used only to complete your donation. If you made your contribution anonymously, the information will not be provided to the charity. Please visit < default: networkforgood.org/privacy > for more information on privacy and security.

Your contribution is being made to Network for Good, a nonprofit, donor advised fund, which will distribute your donation to the nonprofit organization(s) that you indicated. As required by the Internal Revenue Service ("IRS"), Network for Good has exclusive legal control over the donation. In the rare event that a charity you have recommended does not satisfy Network for Good's criteria for receiving donations (e.g., it has been classified by the IRS as a disqualified supporting organization, it cannot or does not accept donations, is not recognized by the IRS as a public charity, or is not in good standing with federal and state regulators), or if the Nonprofit returns its donation to Network for Good for any reason, Network for Good may at its sole discretion select an alternate charity to receive the donation or have the donation allocated to a Fund ("The Generosity Fund') maintained by Network for Good and used solely for charitable purposes including, but not limited to, mission based activities and grants.

If you have questions about your donation, please contact a customer service representative at help@networkforgood.com. For all other **< your company name >** questions, please contact **< your company email >**