

# Would you like to be a Eugene Friends Meeting “Friendly Donor?”

(Automatic Monthly Donor)

On February 18, 2004, Eugene Friends Meeting approved a minute creating an automatic monthly donor program. Those who feel led to become monthly donors may choose an amount that will be deducted automatically from the donor’s selected bank account. Charitable Partnership Fund, a non-profit service bureau, administers the automatic donation program on behalf of Eugene Friends Meeting.

## **BENEFITS:**

- 1) It’s more convenient for donor and Meeting; less time writing checks and processing donations.
- 2) It’s easier to document gifts for tax purposes. The donor will receive an annual statement by January 31 of each year showing the total of all donations made through the Friendly Donor Program during the previous calendar year.
- 3) The donor has an annual opportunity to review giving level and can increase, decrease, or terminate the automatic monthly donation. A Friendly Donor may fill out and send a Friendly Donor Change Form to the treasurer at any time to initiate a change.
- 4) The donor has the option to allocate up to 40% of your monthly gift to a Eugene Friends Meeting Dedicated Fund. However, if you do not designate part of your gift, it can be used to meet the greatest need.
- 5) As of June 30, 2013 48% of donations were deposited through the Friendly Donor Program greatly stabilizing the flow of income that supports Eugene Friends Meeting operations, ministry, and maintenance. The percentage has gradually increased since then.

If you would like to enroll as a monthly “Friendly Donor,” please complete the form on the reverse side, attach a voided check or routing statement from your financial institution, and place the form in the Treasurer’s box or mail it to: Treasurer, Eugene Friends Meeting, 2274 Onyx St., Eugene, OR 97403.

Questions?

Contact the Eugene Friends Meeting Treasurer  
Rachel Ruckman  
541-465-9526  
treasurer@eugenefriendsmeeting.org

# Eugene Friends Meeting Friendly Donor Enrollment Form

(Automatic Monthly Donation Authorization)

Account Holder Name \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Evening Phone \_\_\_\_\_

(in case the Treasurer has questions regarding your wishes)

### Authorized monthly donation to Eugene Friends Meeting:

\$10            \$15            \$20            \$25            \$50

\$100          \$120          Other \$ \_\_\_\_\_

(please enter a multiple of \$5)

Please transfer funds monthly on the:            1st                            15th  
(Circle day of month)

**Please attach a voided check from the account from which you authorize your gift to be automatically withdrawn.**

### OPTIONAL GIFT DESIGNATION

(If you do not designate part of your gift, it can be used to meet the greatest need).

Please allocate a portion of my monthly gift to:  
(Please designate no more than 40% of your total gift by circling the desired %)

- 20% or 40% Capital Improvements Fund
- 20% or 40% Endowment Set Aside Fund
- 20% or 40% Scholarship Fund
- 20% or 40% Sharing Fund

\_\_\_\_\_  
NAME OF MY BANK

\_\_\_\_\_  
MY BANK BRANCH

\_\_\_\_\_  
MY AUTHORIZING SIGNATURE

\_\_\_\_\_  
DATE

***Thank you for your gift!***

I (we) hereby authorize the Charitable Partnership Fund (CPF) to initiate debit entries to my (our) account described on this form, at the Bank identified on this form, and to debit the same to such account. SUCH DEBITS ARE TO BE MADE FOR THE BENEFIT OF EUGENE FRIENDS MEETING hereinafter called RECIPIENT, to be paid to RECIPIENT per terms of agreement between CPF and RECIPIENT. (These debit transactions will be identified on bank statements as 'CHARITABLE PARTNERSHIP' or its abbreviation based on statement format and space limitations).

This authority will remain in effect until I (we) notify the appropriate parties of changes in such time as to allow the Bank a reasonable time to act on the notification. Requests for termination in this program, or for reductions in contribution amounts, should be made to RECIPIENT who will forward to CPF. Requests for increases in contribution amounts, or any notice of changes to account information, must be submitted in writing, accompanied by date and signature(s), to RECIPIENT who will forward to CPF. I (we) understand that while I (we) submit requests for changes regarding my (our) participation in this program to RECIPIENT, final responsibility for notifying CPF of any changes lies with me (us), the donor(s).

I (we) can stop payment of an entry by notifying my (our) financial institution three (3) days before my account is charged.

I (we) understand that if RECIPIENT is not qualified as a public charity, or otherwise does not satisfy distribution policies set forth by CPF, I (we) may identify another organization to serve as RECIPIENT. I (we) further understand that CPF has final authority over the entity that may serve as RECIPIENT, as set forth in CPF's policies.

***NOTE: Eugene Friends Meeting is qualified as a public charity and complies with all mandates. Eugene Friends Meeting has chosen to use the services of the non-profit Charitable Partnership Fund, PO Box 13276, Portland, OR 97213, to process its automatic donations.***