Service List for Fiscal Sponsorship Clients

1. All accounting services:
   - Dedicated project Bank account through City National Bank
     i. Access 24/7 to a read-only bank account
   - DBA filing with Maryland
     i. Doing Business As/Trading As (renewal every five years with a $78 fee to the fund)
   - Monthly accounting reports
   - Revenue processing via the following avenues:
     i. Check
     ii. ACH/wire
     iii. Stocks/securities
     iv. Credit cards through online donation platforms
     v. Cryptocurrency
     vi. In-kind donations
   - Grant financial tracking
   - Donor management
   - Tax receipts (per IRS guidelines)
   - International donations facilitation
   - Expense and reimbursement processing
   - Able to assist and fulfill the following grant requests:
     i. Individual hardship
     ii. Business hardships
     iii. Charitable giving

2. Insurance
   - Directors & officers’ & crime insurance coverage for your project’s financial transactions and board activity
   - Assist in securing additional general liability coverage if needed

3. Security
   - Independent annual audit
   - Secure file sending and receiving
   - Basic charity vetting
     i. EIN confirmation
     ii. GuideStar review

4. Charitable status and IRS compliance
   - Acquire charitable status under PPF’s 501(c)(3)
   - Charity registration annually in all states that require it ($100 annual fee to the fund)
   - IRS compliance requirements through 990 annual filing
   - Proof of status documents including a tax disclaimer statement & W9
   - Sales tax exemption (STE)
     i. STE certificates for participating states

5. Legal
   - Contract review
   - Contract creation (an additional fee paid to legal counsel may apply)

6. Customer service and adherence to best philanthropic practices
   - Fundraising and Audience Building tips
   - Share our suggested vendor list
   - Assistance in fundraising platform set-up
   - Clients can schedule virtual and phone call meetings

7. Grant application support
   - Assistance in donor and grant research
   - Access to the Foundation Directory Online

8. Event Support
   - Assistance in creating event tickets/sponsorship pages
   - Acquire event insurance

9. Technology to meet the Fund’s philanthropic needs ($300 annual fee to the fund)