

THE GIVING PARTNER

CHECKLIST for Existing Profiles

If your organization **has an existing profile** in The Giving Partner, follow this checklist to update all necessary fields before submitting your profile for re-verification to our profile review team.

| PROGRAMS & RESULTS TAB | |
|---|--|
| <input type="checkbox"/> Program Costs (Annual) <input type="checkbox"/> \$ Amount of Need <input type="checkbox"/> Projected Number to be Served <input type="checkbox"/> Actual Numbers Served | <input type="checkbox"/> Date Actual Numbers Served were Achieved or Reported <input type="checkbox"/> Numbers Served by This Program (overall) <input type="checkbox"/> Number or % that Achieved Intended Results |
| FINANCIALS TAB | |
| <p>CURRENT / PROJECTED:</p> <input type="checkbox"/> Your Current Fiscal Period Begins <input type="checkbox"/> Your Current Fiscal Period Ends <input type="checkbox"/> Projected Annual Revenue <input type="checkbox"/> Projected Annual Expenses | <p>FINANCIAL DATA: Enter data for three most recent fiscal years available.</p> <input type="checkbox"/> Financial Year ENDING <input type="checkbox"/> Total Revenue <input type="checkbox"/> Total Expenses <input type="checkbox"/> Contributions & Grants Received <input type="checkbox"/> Program Service Revenue <input type="checkbox"/> Investment Income |
| <p>FINANCIALS – OTHER:</p> <input type="checkbox"/> Administrative Needs (list at least 1 but no more than 3) | <p>FINANCIAL DATA – EXPENSE ALLOCATION:</p> <input type="checkbox"/> Expenses – Administration <input type="checkbox"/> Expenses – Program <input type="checkbox"/> Expenses – Fundraising |
| <p>IRS FORM 990:</p> <input type="checkbox"/> IRS Form 990 – Upload three most recent 990s based on Fiscal Year ENDING date. If IRS indicates organization has an Exemption, then skip this 990 section and go to statements or audit section. | <p>FINANCIAL DATA – ASSETS & LIABILITIES</p> <input type="checkbox"/> Total Assets <input type="checkbox"/> Current Liabilities <input type="checkbox"/> Net Assets |
| <p>FINANCIAL STATEMENTS OR AUDIT:</p> <input type="checkbox"/> Financial Statements or Audit – Upload three most recent fiscal years available. Required if organization files 990-N, or if a chapter of another organization, or if IRS determines organizations is Exempt from 990. | |
| OPERATIONS TAB | |
| <input type="checkbox"/> State Charitable Solicitations Permit (Example Attached) <input type="checkbox"/> State Charitable Solicitations Permit – Expiration Date | |
| GOVERNANCE TAB | |
| <input type="checkbox"/> Board Chair – Term Begins & Term Ends <input type="checkbox"/> Board Meeting Attendance % <input type="checkbox"/> Board Demographics | |

All other fields in your profile can be updated at your discretion.

Tips for Updating Your Profile:

- Login to your account at [GiveGab](#) to make edits to your profile in The Giving Partner.
- Detailed instructions can be found within your profile by clicking on the Info Bubbles next to fields.
- After uploading a document and clicking SAVE, a **“Document Uploaded and is Being Reviewed”** message will appear. Certain fields require our review before being finalized.
- After you have fully completed your updates, click **Submit for Re-Verification** (top right of profile).
- If you encounter any technology issues, need clarification, or help uploading documents, connect with the Customer Success Team by clicking the [Blue Chat Bubble](#) at the bottom right corner of your dashboard or reach out via email at CustomerSuccess@GiveGab.com.

Below is an example of a State Charitable Solicitations permit.

1-800-HELP-FLA (435-7352)
www.800helpfla.com
www.freshfromflorida.com



DIVISION OF CONSUMER SERVICES
2005 APALACHEE PKWY
TALLAHASSEE FL 32399-6500

FLORIDA DEPARTMENT OF AGRICULTURE & CONSUMER SERVICES
COMMISSIONER ADAM H. PUTNAM

June 27, 2016 Refer To: *Redacted*

Redacted

RE: *Redacted*
REGISTRATION#: *Redacted*
EXPIRATION DATE: June 27, 2017

Dear Sir or Madam:

The above-named organization/sponsor has complied with the registration requirements of Chapter 496, Florida Statutes, the Solicitation of Contributions Act. A COPY OF THIS LETTER SHOULD BE RETAINED FOR YOUR RECORDS.

Every charitable organization or sponsor which is required to register under s. 496.405 must conspicuously display the registration number issued by the Department and in capital letters the following statement on every printed solicitation, written confirmation, receipt, or reminder of a contribution:

"A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE."

The Solicitation of Contributions Act requires an annual renewal statement to be filed on or before the date of expiration of the previous registration. The Department will send a renewal package approximately 30 days prior to the date of expiration as shown above.

Thank you for your cooperation. If we may be of further assistance, please contact the Solicitation of Contributions section.

Sincerely,
Don Dietrich
Don Dietrich
Regulatory Consultant
850-410-3756
Fax: 850-410-3804
E-mail: don.dietrich@freshfromflorida.com

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