



REFERENCE GUIDE

PROGRAM OVERVIEW

- Birdies for Charity presented by TowneBank is a fundraising platform, operating in conjunction with the Dominion Energy Charity Classic, that enables Richmond-area charitable organizations to receive a 10% bonus on charitable contributions.
- Birdies for Charity is designed as a platform that can be easily integrated into existing solicitation efforts.
- Participating charities will receive all donations collected on their behalf, minus credit card fees for online donations, plus the additional 10%. There is no minimum amount organizations must generate to receive the bonus.
- There is no monetary cap on donations accepted through the Birdies for Charity program; however, there is a \$10,000 maximum bonus per participating charity. There is a \$125,000 maximum bonus for the entire program that will be met on a first-come, first-served basis.

Example #1:

If Charity A generates \$50,000 through the Birdies for Charity program, Charity A will receive a \$5,000 bonus and thus will receive \$55,000 less any credit card fees.

Example #2:

If Charity B generates \$150,000 through the Birdies for Charity program, Charity B will receive the maximum bonus per charity of \$10,000 and thus receive \$160,000 less any credit card fees.

- This program is operated by PGA TOUR Charities, Inc., a 501(c)(3) charitable organization (EIN: 59-2774423).

BENEFITS FOR PARTICIPATING CHARITIES

- 10% bonus on every donation received through the program (maximum bonus of \$10,000 bonus per charity).
- Program and participation exposure from the Dominion Energy Charity Classic.
- Comprehensive toolkit of resources to aid in fundraising and solicitation efforts.

HOW TO BECOME A PARTICIPATING CHARITY

- Charitable organizations recognized by the Internal Revenue Service as a 501(c)(3) are eligible to participate.
- Interested charities are required to complete the [online application](#), agree to the Terms and Conditions of participation and upload their 501(c)(3) IRS Determination Letter, Form W9 and banking information for ACH Direct Deposits. Banking information can be submitted on organization letterhead or via an official bank letter.
- PGA TOUR Charities, Inc. will approve or deny registrations. Charities may begin soliciting donations upon approval.

IMPORTANT: Registration for the 2021 program will open Tuesday, April 13, 2021. Returning participants must re-register.

DONATION INFORMATION

- Participating organizations will solicit donations on their own behalf. The PGA TOUR and Dominion Energy Charity Classic will not solicit for any specific organization.
- One-time flat donations are the only type of donation accepted. There is a minimum donation amount of \$25.00.
- Online donations require a credit or debit card (Mastercard, Visa and American Express are accepted) and are processed immediately. Credit card fees range from 2.5% - 3.5% and vary based on card. **The 10% bonus is calculated on the gross amount for online donations.**
- Donors who would like to have their gift matched by a corporation must make their gift through Birdies for Charity and complete their company's required paperwork by **June 1**, and the corporate match must be received by **October 24, 2021** to receive a 10% bonus on both gifts.
- Organizations are not responsible for donation receipts for tax-deduction purposes but are encouraged to send gift acknowledgements in a timely fashion upon notification of donation (see page 3 for donor acknowledgment).
- Donors who make a tax-deductible gift online via credit card, via check, stock transfer or electronic funds transfer (EFT), will receive a donation receipt from PGA TOUR Charities, Inc. for tax-deduction purposes. Donors who give online will receive a donation receipt via email immediately following donation. All other donation receipts will be distributed via mail.
- The final day for donations is October 24, 2021. **Donations will not be accepted after October 24, 2021.**

DONATION INSTRUCTIONS

ONLINE: (Mastercard, Visa and American Express are accepted. Credit Card Fees Apply)

1. Visit deccgolf.com and click "Charity," "Birdies for Charity," then "Donate Now"
2. Enter the gift amount, choose a participating charity from the drop-down menu, fill out the billing information form and confirm the gift

IMPORTANT: Gift charges will show as PGA TOUR Charities, Inc. (Tel: 1-904-285-3700) on bank statements.

CHECK:

1. Make checks payable to **PGA TOUR Charities, Inc.** and write the designated participating charity/charities in the memo line
2. Mail checks to: Dominion Energy Charity Classic, 707 East Main Street, Suite 1025, Richmond, VA 23219, Attn: Birdies for Charity

Note: If giving to multiple charities, please designate each charity and gift amount in the memo line or an attached note.

STOCK or ELECTRONIC FUNDS TRANSFER (EFT):

1. Please contact Community Outreach Coordinator, Kali Edsall, at kaliedsall@pgatourhq.com to obtain a PGA TOUR Charities, Inc. **Stock Transfer Form** or **EFT Form**.

IMPORTANT: Stock donations must be a minimum of \$1,000. Stock gift/bonus are valued based on the average price of the stock on the date received and the gains or losses experienced.

DONOR ADVISED FUNDS:

1. Select **PGA TOUR Charities, Inc.** for the gift recommendation in your donor portal and designate the participating charity/charities and gift amounts in the gift purpose section
2. Follow the prompts to complete the gift request

REQUIRED MINIMUM DISTRIBUTION FROM IRA: (Donors aged 70.5 and older)

1. Ask IRA Fund Manager to issue a check in the desired amount to **PGA TOUR Charities, Inc.** and designate the participating charity/charities and gift amounts in the memo line
2. Mail checks to: Dominion Energy Charity Classic, 707 East Main Street, Suite 1025, Richmond, VA 23219, Attn: Birdies for Charity

DONOR ACKNOWLEDGEMENT

- Participating charities have 24/7 access to the online donation portal, thus will be aware of donations made online and are encouraged to send a thank you letter or email, in a timely manner, to continue the direct relationship with the donor.
- When a donation is received via check, donor advised fund, stock transfer, EFT or IRA contribution, Community Outreach Coordinator, Kali Edsall, will notify the charity. Thus, participating charities will be aware of all other contributions and are encouraged to send a thank you letter or email, in a timely manner, to continue the direct relationship with the donor.
- PGA TOUR Charities, Inc. will send donation receipts for tax-deduction purposes.

ACCESSING YOUR ONLINE DONOR PORTAL

- Visit <https://pgatourcharities.org/> to access the online donation portal
- Click the person symbol in the upper right-hand corner, select “Register” and fill out the form

Note: you must use the email address associated with your registration for Birdies for Charity)

- You will receive a code via email to verify your email
- Login with your new username and password

Note: you must use your username, not email, when logging back in)

- Click on “**Donors by Charity Report**” to view your donor information for online donations. “Anonymous” donations indicate the donor has asked PGA TOUR Charities, Inc. to not share their information. This report is updated in real time.

FUNDS DISTRIBUTION PROCESS

- Funds will be distributed via ACH Direct Deposit in three installments to all participating charities with donated funds.
- Charities that would like to receive funds via ACH Direct Deposit must provide banking information via organization letterhead or provide an official bank letter. Charities will have the option to upload these files at the time of registration or may email them to Community Outreach Coordinator, Kali Edsall, at kaliedsall@pgatourhq.com.

IMPORTANT: Charities will have the option to have funds distributed via check. Charities who do not submit banking information will automatically receive distributed funds via check. Checks will be mailed to the address noted on the organization’s W9 attached to their registration form.

FUNDS DISTRIBUTION TIMELINE

- Funds generated between April 13 (program launch) and June 30, not including the 10% bonus, will be distributed by August 31.
- Funds generated between July 1 and August 31, not including the 10% bonus, will be distributed by October 31.
- Funds generated September 1 and October 24 (final day of the Dominion Energy Charity Classic), plus the 10% bonus on all funds donated, will be distributed by December 31, 2020.

Note: These dates are subject to change.

PROGRAM TIMELINE

April 13, 2021

- Registration for the 2021 program opens (charities may begin soliciting donations upon approval)

IMPORTANT: Returning participants must re-register to participate in the 2021 program.

PROGRAM TIMELINE CONTINUED

April 13, 2021 - October 24, 2021:

- Participating organizations solicit donations (see solicitation guide for best practices and solicitation resources)

June 1, 2021:

- Deadline for corporate matching gift forms to be submitted

June 30, 2021:

- Cutoff for donations to be included in August distribution

August 31, 2021:

- Funds generated between April 13 (program launch) and June 30 distributed to organizations via ACH Direct Deposit
- Cutoff for donations to be included in October distribution

October 22, 2021:

- Dominion Energy Charity Classic begins

October 24, 2021:

- Final day of tournament and Birdies for Charity program - **Donations will not be accepted after October 24**

October 31, 2021:

- Funds generated between July 1 and August 31 distributed to organizations via ACH Direct Deposit

December 31, 2021:

- Funds generated between September 1 and October 24, plus 10% bonus on all funds generated, distributed to organizations via ACH Direct Deposit

PROMOTIONAL MESSAGING & LOGO USAGE GUIDELINES

- The official name of the program is **Birdies for Charity presented by TowneBank**. The first time the program is mentioned in communications, please refer to the name of the program as **Birdies for Charity presented by TowneBank**. Subsequent mentions can be referred to as **Birdies for Charity**.
- The Dominion Energy Charity Classic and PGA TOUR/PGA TOUR Charities, Inc. operate the Birdies for Charity program. Please use **Dominion Energy Charity Classic** when referencing the tournament. If you would like to reference the PGA TOUR, please use **PGA TOUR**.
- Participating organizations are encouraged to use the Birdies for Charity presented by TowneBank logo in solicitation efforts. Please email Kali Edsall, Community Outreach Coordinator, if you have not received logo files.
- Samples of any materials containing any logo associated with the tournament or program, electronic or hard copy, must be submitted to Kali Edsall, Community Outreach Coordinator, for approval prior to distribution.
- Do not change the colors or fonts used in the logo or place the logo on a busy background; do not add any other graphic elements to the logo.

DOMINION ENERGY CHARITY CLASSIC TOURNAMENT INFORMATION

- The Dominion Energy Charity Classic is a PGA TOUR Champions playoff event held at The Country Club of Virginia, James River Course every October.

DOMINION ENERGY CHARITY CLASSIC TOURNAMENT INFORMATION CONTINUED

- The event features the top 72 golfers on PGA TOUR Champions and is the first of three playoff events to determine the Charles Schwab Cup champion.
- The Dominion Energy Charity Classic has helped to give back over \$5 million to the Richmond community since the event's inception in 2016.
- The Dominion Energy Charity Classic has been awarded the PGA TOUR Champions Players' Award in 2016, 2017 and 2019 and the PGA TOUR Champions Corporate Partnership Award in 2018.
- Past Champions include Phil Mickelson ('20), Miguel Ángel Jiménez ('19) Woody Austin ('18), Bernhard Langer ('17) and Scott McCarron ('16).

CONTACT INFORMATION

- Kali Edsall, Community Outreach Coordinator:

Phone: 804-234-8845

Email: kaliedsall@pgatourhq.com

DISCLAIMERS

- Maximum bonus of \$10,000 per group and \$125,000 for the entire program.
- Donations support charitable organizations operating in the Richmond area and are tax deductible to the extent allowed by law.
- This program is operated by PGA TOUR Charities, Inc., a 501(c)(3) charitable organization (EIN: 59-2774423).
- A copy of the financial statement is available from the Division of Consumer Affairs, Department of Agricultural and Consumer Services, 1100 Bank Street, Richmond, VA 23219 or call 1-804-786-1343.
- The PGA TOUR and Dominion Energy Charity Classic will not solicit for any specific organization and will only use donor information for documentation purposes unless donors do not opt out of PGA TOUR Charities, Inc. communications when donating online.
- For more information about charitable donations, please [click here](#).
- All information is subject to change.