THE PLEDGE FORM

Ensure every person receives a pledge form! It is a 3 part form used to record donor information, contribution method, amount, designation data and payroll deduction authorization. A donor may give by cash, personal check or payroll deduction.

Ensure the pledge form is mathematically correct and no changes have been made to the form that have not been initialed by the donor. Should a change or correction be required, it must be done by the donor and OPM recommends the donor fill out a new form. The erroneous pledge form must be destroyed when replace by the corrected form. If a donor wishes to give to more than 5 charities two forms must be used; additional charities cannot be written onto the first form.

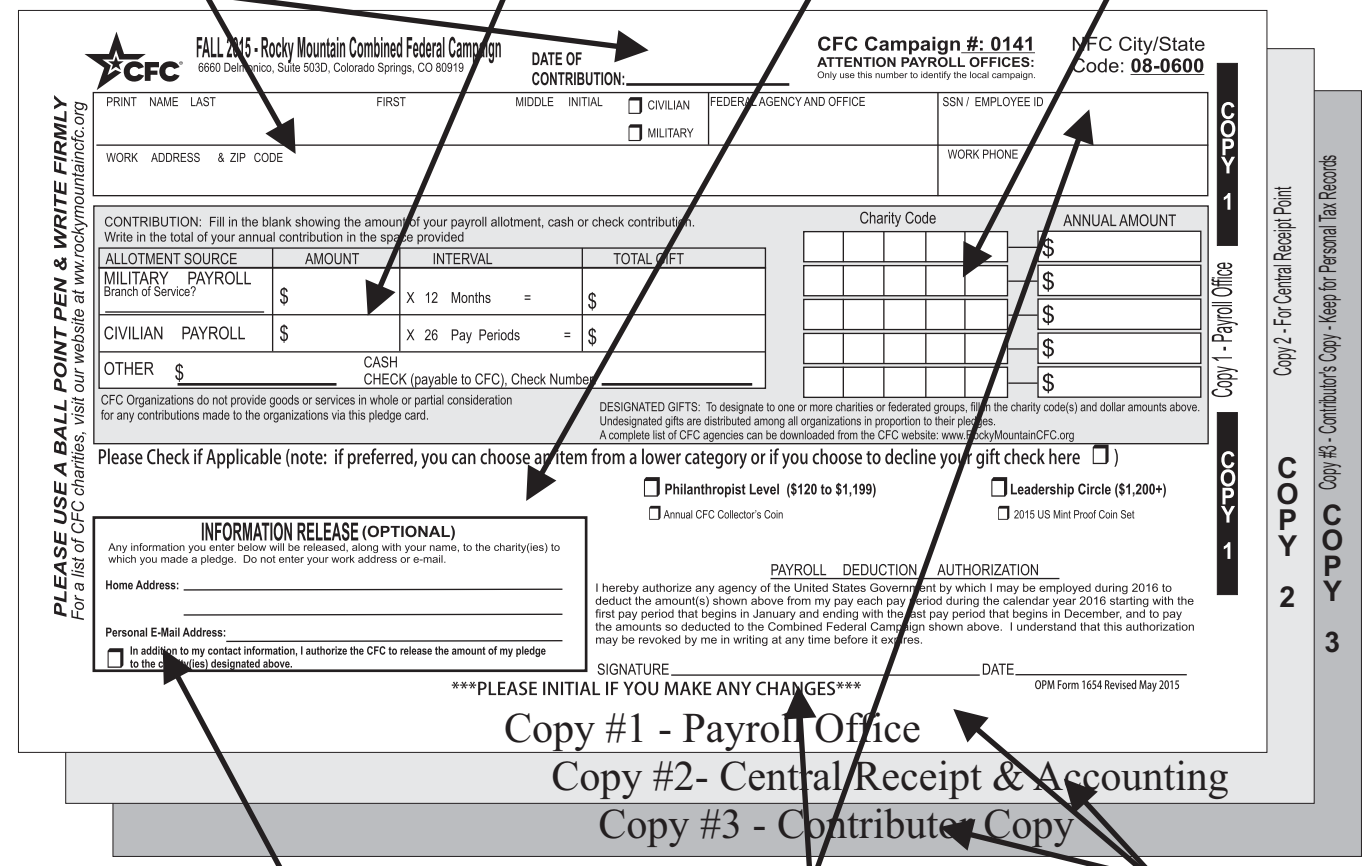
Please check each pledge card for completeness and accuracy. The Following guide can be used to instruct donors in completing the form; and be used by the Keyworker as a checklist.

Step 1 - Date, then Print name, work address, telephone number, and your Federal Agency.

Step 2 - Fill in the appropriate boxes for either military or civilian, the monthly / periodical deduction, and the total. Fill out the "Other" section if making a cash or check contribution.

Step 3 - If applicable, check the appropriate awards level donation boxes.

Step 4 - Fill in the 5 DIGIT CFC agency code number (as listed in the Agency Brochure or on the website www.RockyMountainCFC.org) and the **annual** amount of the designation to each (up to 5 are accepted).



Step 5 - If you would like your name, HOME address, E-mail address and/or the amount of your pledge released to the agencies you designated funds to, fill out this section. If you do not fill out this section your information will not be released. This information will only be released to the agencies you have chosen - NO OTHERS.

Step 6 - Make sure the pledge form is signed and dated and that your social security number is provided if using payroll deduction.

Step 7 - Contributors keep copy #3 for their records. Keep copies #1 and #2 together, report the totals on the Keyworker Envelope and turn them into your CFC point of contact.

TOP 5 COMMON ERRORS

1. Illegible. If it is unreadable, the pledge may not be processed correctly.
2. Monthly gift is listed as the annual gift - when specifying your gift to each agency fill in the ANNUAL AMOUNT.
3. Designation to an invalid agency code. The 5 digit code must be valid from the Local, National, International or Universal Giving Charity list available at www.rockymountaincfc.org or www.opm.gov/cfc.
4. Form isn't signed - payroll deduction can not be authorized if the form isn't signed.
5. Social Security Number is not provided - payroll deduction can not be authorized without the SSN. USPS Employees may use their USPS Employee ID #.