

## CMAA FOUNDATION ACTIVITY FORM

Use of the CMAA Foundation as a means of fundraising and distribution must be consistent with the purposes of the Foundation and its tax status and is subject to the approval of the Foundation's Board of Directors. As a practical matter, the CMAA national office will review all submittals and refer issues on a by-exception basis.

Submittal of a Foundation Activity Form is required when engaging in fundraising and when distributing funds from an account. No deposits will be accepted and no disbursements made on behalf of any sub-account holder without a Foundation Activity Form approved in advance.

Name of Chapter: \_\_\_\_\_

Name of Person Submitting Form: \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_

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

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Name of Treasurer: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Request for:      Fundraising Approval                       Please Complete Section I.

   Fund Disbursement Approval                       Please complete Section II.

Section I. Fundraising Event Approval

Event Purpose and Description: \_\_\_\_\_

Date of Solicitation: \_\_\_\_\_ to \_\_\_\_\_

States in which solicitation will be conducted: \_\_\_\_\_

Date of Event: \_\_\_\_\_

Estimated Number of Participants: \_\_\_\_\_ (Diners, contributors, etc.)

Cost per participant: \$ \_\_\_\_\_      Amount charged per participant: \$ \_\_\_\_\_

Estimated Total Income: \$ \_\_\_\_\_ (includes tickets, donations, sponsorships, etc.)

Estimated Total Expense: \$ \_\_\_\_\_ (includes promotion, entertainment, speakers, meals, supplies, etc.)

Estimated Net Funds Raised: \$ \_\_\_\_\_

Copy of solicitation, invitation, or other promotional material is attached

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Section II. Fund Disbursement Approval

Purpose of Disbursement: \_\_\_\_\_

Amount of Disbursement: \$ \_\_\_\_\_

Designated Recipient Name: \_\_\_\_\_

Address: \_\_\_\_\_

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

Delivery:  To Chapter Officer \_\_\_\_\_

To Recipient of Funds

Copy of Application is attached if applicable

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Section III. Authorization

All fundraising events and disbursements must be approved by vote of the Chapter Board of Directors and authorized by the CMAA Foundation Treasurer with the approval of the CMAA Foundation Chairman.

Signatures: \_\_\_\_\_ Date: \_\_\_\_\_; OR  
Chapter President

\_\_\_\_\_ Date: \_\_\_\_\_  
Chapter Secretary/Treasurer

Approved: \_\_\_\_\_ Date: \_\_\_\_\_; OR  
Assistant Treasurer, CMAA Foundation

\_\_\_\_\_ Date: \_\_\_\_\_  
President, CMAA Foundation