

# When a Charity or Fund-raiser Calls, Ask Questions and Take Notes!

Use this form to make notes of conversations with telephone solicitors. Keep copies of this form handy.

## 1. Get the Facts

Date: \_\_\_\_\_

Time: \_\_\_\_\_ am / pm

## 2. Listen for These Required Disclosures

- Charity Name: \_\_\_\_\_
- Location of Charity: \_\_\_\_\_
- Name of the Professional Fundraising (Telemarketing) Firm \_\_\_\_\_
- Amount of the Donations that Is Tax Deductible: \_\_\_\_\_
- Description of the Charitable Program: \_\_\_\_\_  
\_\_\_\_\_

## 3. Ask a Few Additional Questions

- How much of my donation will be spent on programs? \_\_\_\_\_ %
- How much will go to fundraising? \_\_\_\_\_ %

## 4. Take the Action You Believe Is Appropriate

- Yes, Agreed to Donate: \$ \_\_\_\_\_
- No, Declined to Donate
- Undecided, Need to Research Further
- Requested Information Sent to My Home

## 5. Additional Notes

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### Remember:

- Don't feel pressure to donate.
- If you want to learn more, ask for written information.
- Before you send a check, check it out! If convinced, send your check later.
- Feel free to ask the caller to repeat information.

If the caller did not make the required disclosures, or if you would like information about any of the 8,500 charities or professional fund-raisers registered with our office you may visit or write us at Minnesota Attorney General's Office, Charities Division, 445 Minnesota Street, Suite 1200, St. Paul, MN 55101. You may also call us at 651-296-3353 or 800-657-3787. TTY users may call 651-297-7206, or 800-366-4812. For those who have Internet access, a summary of every registered charity's IRS tax return (form 990) is available on our website at [www.ag.state.mn.us](http://www.ag.state.mn.us).