



## **MINISTRY CHARITY FUNDS AT CAPSTONE LEGACY FOUNDATION**

### **Description of Services**

Multiple donors interested in the same charitable cause or organization may leverage their combined resources through a Ministry Charity Project (MCP). Capstone, as a tax-exempt 501(c)(3) nonprofit, will handle all back-office administrative responsibility for the project. Distributions will be made to the designated cause or organization and donors will receive a tax deduction for their generosity.

### **Characteristics**

- A clear, specific purpose approved by the Board of Directors for ongoing charitable, religious and educational activity
- Approved Project Manager with three letters of reference
- An approved annual budget
- A group of committed donors
- Approved fundraising methods, materials, and special events
- May have administrative employees, contract for services or grant distributions
- Liability insurance may be required
- Any legal or other direct project expenses incurred will be charged directly to the MCP
- Minimum initial contribution of \$5,000
- Minimum cash balance of \$500 must be maintained
- Closing fee will be reserved from available balances
- Projects retaining \$25,000 or greater may select an approved investment pool
- On-line Fund View available for Project Manager to view balances and account activity
- Receipts for all contributions will be mailed to donors
- Immediate Capacity—501 (C)(3) & Back office support
- Economies of Scale—collective savings on services
- Keep Your Organization's name—Administered by Capstone Legacy
- Soil to Grow—our resources allows you to focus on your ministry
- Incubation to your own 501 (c)(3) or Permanent MCP w/ Capstone
- Opportunities for non-profit training & technical assistance
- Facility for anonymous giving
- Professional staff in your service so you can focus on ministry growth & development.
- Donor View-online access to your account information
- Compliance Management, 990's, Audits, etc.

***Helping steward your gifts into a living legacy***



## MINISTRY CHARITY PROJECT AGREEMENT

### Part I CONTACT INFORMATION

|                                   |                       |
|-----------------------------------|-----------------------|
| PROJECT NAME <i>(print)</i> _____ |                       |
| PROJECT MANAGER _____             |                       |
| ADDRESS _____                     |                       |
| CITY _____                        | STATE _____ ZIP _____ |
| WORK PHONE _____                  | HOME PHONE _____      |
| EMAIL _____                       | FAX NUMBER _____      |

### Part II MISSION AND GOALS *(Please complete attached Schedule A)*

### Part III FUNDING METHODS

|  |   |
|--|---|
| INITIAL CASH FUNDING \$ _____ <i>(please include)</i>                                |   |
| OTHER FUNDING METHODS <i>(Please indicate fundraising efforts that may be used.)</i> |   |
| <input type="checkbox"/> Mail, newsletter  | <input type="checkbox"/> Professional fundraiser                  |
| <input type="checkbox"/> Media: TV, radio, DVD                                       | <input type="checkbox"/> Golf tournaments, banquets, walk-a-thons |
| <input type="checkbox"/> Verbal communication  | <input type="checkbox"/> Other <i>(to be discussed)</i>           |

### Part IV BUDGET *(Please complete attached Schedule B)*

### Part V REFERENCE AND EXPERIENCE

|   |
|---|
| 1) Please indicate how you heard about Capstone Legacy Foundation, Inc., and the Ministry Charity Project.<br>_____ |
| 2) Attach a paragraph explaining your work and/or ministry experience.  |
| 3) Attach three reference letters from non-related parties.   |

\_\_\_\_\_  
Initial Initial

# MINISTRY CHARITY PROJECT AGREEMENT

## AGREEMENT AND ACKNOWLEDGEMENT

By completing and signing this agreement, I am applying as the Project Manager of a Ministry Charity Project in Capstone Legacy Foundation, Inc. and its affiliates (Capstone). I will abide by the policies and conditions set forth by Capstone and manage the Ministry Charity Project in compliance with the regulations of the Internal Revenue Code. I have read the Capstone Statement of Faith and am in full agreement. I agree not to propagate any other doctrines or practices while serving. I acknowledge receipt of the current Pricing Schedule. I understand that in order for contributions to qualify as an income tax deduction, all gifts are irrevocable, and the ownership and custody of the donated funds and property will be fully relinquished to Capstone. I understand that the ultimate decisions and control relative to the Ministry Charity Project are the responsibility of the Board of Directors of Capstone. I agree that this document and any others relating to this agreement, whether original, faxed, or electronic, will be deemed original.

### APPLICANT/PROJECT MANAGER

\_\_\_\_\_

*(Please print name)*

\_\_\_\_\_

Signature

Date

**Acknowledged and Accepted:**  
**CAPSTONE LEGACY FOUNDATION, INC.**

By: \_\_\_\_\_  
Signature

\_\_\_\_\_  
Name of Capstone Legacy Foundation Officer

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date



## Statement of Purpose

### MISSION

Leveraging the blessing of generosity into God's Kingdom purposes for generations to come.

### VISION

The Community one in Christ.

### VALUES

Christ-centered, Earning Relationships, Evoking Passion, Empowering Intentional Stewardship, Prayer Guided, Sharing Living Legacies

### STATEMENT OF FAITH

1. We believe that the entire Bible is the inspired and inerrant Word of God; the only infallible rule of faith and practice.
2. We believe that there is one God, eternally existing in three persons: Father, Son and Holy Spirit.
3. We believe that Jesus Christ is the only begotten Son of God, conceived by the Holy Spirit, born of the Virgin Mary, and that He was true Man and is true God.
4. We believe that in this age, God manifests Himself through the Holy Spirit who is a distinct personality, eternally co-existent with the Father and the Son, whose basic task is to convict sinners, regenerate those who believe, and empower believers to live godly lives and in every way glorify the Father and the Son through His indwelling presence.
5. We believe that man was created in the image of God, and that He sinned and thereby incurred not only physical death, but also spiritual death, which is eternal separation from God.
6. We believe that the Lord Jesus Christ died for our sins according to the Scriptures, as a representative and substitutionary sacrifice, and that all who believe in Him are justified on the basis of His shed blood.
7. We believe that the Lord Jesus Christ was resurrected in body, ascended into Heaven, currently lives there for us as High Priest and Advocate, and that His personal, physical return to earth is imminent.
8. We believe in the bodily resurrection of the just and the unjust, the everlasting punishment of the lost, and the everlasting redemption of the saved.

These eight principles form the basis of how we determine which ministries and charitable organizations qualify to receive grants recommended by individual givers. Proposed grant recipients that are ministry related must sign the Statement of Faith. Others may not be required to sign the Statement of Faith, but they may not operate in contravention to it, as determined by our Board.

### INELIGIBLE DISTRIBUTIONS

Capstone will not authorize the distribution of charitable funds to advance atheism, humanism, homosexual lifestyles, Marxism, anti-Americanism, abortion, violence, witchcraft, or any other activity that the Executive Leadership and/or Board of Directors might at any time deem to be inappropriate, in conflict with the Statement of Faith that is ascribed to by the Board of Directors, or contrary to the organizations' purposes, even though such purposes may be sanctioned by the Internal Revenue Service as legitimate purposes for tax-deductible donations and/or sponsored by other tax-exempt organizations. Capstone retains the ultimate right to determine whether the request for distribution may fall into one of the above categories.

Prohibited distributions as established by the Internal Revenue Code include, but are not limited to, the following:

- To provide private benefit to the donor or any other related individual
- To pay dues or membership fees
- To purchase tickets to a charitable event or benefit, such as banquets, golf tournaments, auctions, sponsorships
- To pay a pledge may by donor to another charitable organization
- To pay for school tuition—apart from an established scholarship program
- To support charities on the terror-watch list
- To support a political party or candidate for election

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Initial

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Initial

# MINISTRY CHARITY PROJECT AGREEMENT

## SCHEDULE A

### *Part II* MISSION AND GOALS

1) *Please explain the mission and purpose of the Ministry Charity Project:*

2) *List goals and how you intend to accomplish the mission:*

# SCHEDULE B

*Part IV BUDGET (indicate estimated budget below or attach a spreadsheet)*

## Income

1) *Please include a list of committed donors and expected gifts and other income:*

2) *Please outline anticipated fundraising events and intentions:*

## Expense

*List all estimated expenses for the first year:*

# MINISTRY CHARITY PROJECT (MCP)

## GUIDELINES

- A clear, specific purpose approved by the Board of Directors for ongoing charitable, religious, and educational activity
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- May have administrative employees, contract for services or grant distributions
- Liability insurance may be required
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- Minimum initial contribution of \$5,000
- Minimum cash balance of \$500 must be maintained
- Closing fee will be reserved from available balances
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- A printed year-end Project Statement will be provided
- Receipts for all contributions will be mailed to donors

## PRICING SCHEDULE

**Application Charge** (deducted from initial contribution)..... \$1,000

**Incoming Charge** .....8%

### **Special Services:**

Special Handling..... Cost plus \$25  
 Credit Card Donations.....3%  
 Charitable grant to non-qualified organizations.....\$100  
 Transfers to Field of Interest Funds.....Greater of \$100 or 2%  
 Contract labor/consultant (each 1099 sent) ..... \$25  
 Employee (Monthly Payroll)..... \$50  
 Foreign mail charge..... Cost of Mailing  
 Special events processing ..... \$195  
 Distributions..... \$10  
 Monthly Project Statements mailed or faxed ..... \$10  
 Closing fee .....\$500

### **Non-traditional Assets:**

Contribution Fee.....\$1,000  
 Liquidation Fee.....\$1,000

- Non-traditional investments will incur a 1% due diligence origination fee.
- An annual due diligence fee may be assessed depending upon the complexity of the asset.

*Although the Board of Directors reserves the right to change the fee structure at any time, we remain committed to maintaining the lowest pricing schedule possible consistent with our ability to provide quality services.*

\_\_\_\_\_

*Initial*

\_\_\_\_\_

*Initial*