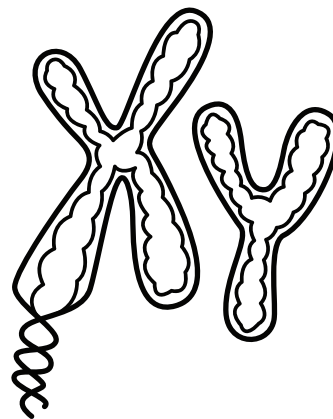
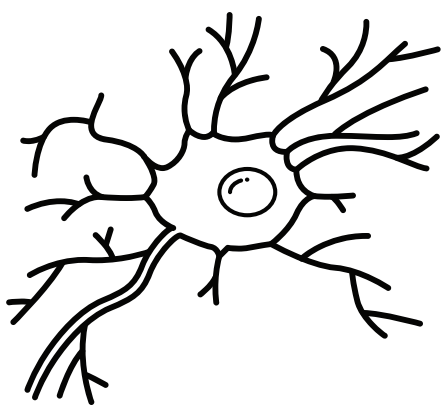


The Wahls
Research Fund

IOWA

Guidelines for Hosting Third-Party Events

to benefit Terry Wahls MD Research Fund



IOWA

Center for
Advancement

THANK YOU!

Thank you for your interest in hosting an event to benefit the Terry Wahls MD Research Fund at the University of Iowa.

The University of Iowa Center for Advancement is a nonprofit organization on the University of Iowa campus that solicits private, tax-deductible contributions for all areas of the university, including the diet and lifestyle research for Dr. Terry Wahls. The UI acknowledges the UI Center for Advancement as the preferred channel for private contributions that benefit all areas of the university.

Your third-party event could help support the next disease state and the benefits of the Wahls Protocol.

In this toolkit, you will find information about hosting and planning your event, as well as the UI Center for Advancement's promotional and financial guidelines. Please read the information carefully and submit the proposal form in the back of the packet to the UI Center for Advancement for third-party event consideration.

A member of our Internal Medicine development team will contact you within one week of receiving the form to inform you whether or not the event is approved. Please contact Hayden Bevelacqua with any questions at 319-467-3382 or Hayden.Bevelacqua@foriowa.org.

We hope you find this toolkit helpful for planning your event.

Sincerely,

Hayden Bevelacqua
Associate Director of Development, Health Sciences
Carver College of Medicine
Iowa Health Care
University of Iowa Center for Advancement

Mail to:

UI Center for Advancement
Attn: Internal Medicine
Development Team
P.O. Box 4550
Iowa City, IA 52244



PRIOR TO ANY EVENT ACTIVITY:

Please contact the Internal Medicine development team at least **two months** prior to the event to obtain approval. Our team will contact you within one week of receiving your proposal form.

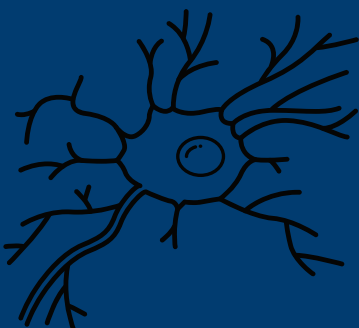
If your event is scheduled to take place within the next two months, we still require you to submit a proposal form. Please contact us as soon as possible.

The UI Center for Advancement reserves the right to request additional information before approving any event or activity.

All event proposal forms and general event inquiries should be directed to:

*UI Center for Advancement
Attn: Internal Medicine
Development Team
PO Box 4550
Iowa City, IA 52244*

*319-467-3382
Hayden.Bevelacqua@foriowa.org*



GUIDE TO HOSTING AN EVENT TO BENEFIT TERRY WAHLS MD RESEARCH FUND

Below are tips to assist you and your committee in planning your event. These tips should be used in addition to the guidelines outlined in this toolkit. Once your event is approved, additional materials will be sent.

FIRST STEPS

- Evaluate your time and the strengths of your planning committee to determine an appropriate event
- Brainstorm and begin formulating goals

DEFINE EVENT CONCEPTS

- Determine the type of event you will be executing
- Determine the planning committee
- Identify event specifics, such as date, time and location

GAIN APPROVAL

- Review this entire toolkit, paying special attention to the financial and promotional guidelines (found on Pages 6-9).
- Submit the third-party event proposal form at least two months before your event date

DETAILS

- Create a fundraising plan with a realistic goal and budget
- Establish a time line to know when important tasks should be completed
- Secure volunteers and participants for your event

EXECUTION

- Promote and publicize your event and/or mail invitations
- Review fundraising plan, budget, time line and volunteer/vendor tasks
- Enjoy the event; make sure to congratulate and thank everyone involved

FOLLOW-UP

- Submit funds to UI Center for Advancement within 30 days of the event
- Acknowledge and thank your donors, participants, volunteers and all who contributed

HOW WE CAN HELP

In order to assure that your event will be as successful as possible, the development team at the UI Center for Advancement can provide a variety of assistance and services to guide you in your fundraising efforts, from which the resulting donations benefit Terry Wahls MD Research Fund through the UI Center for Advancement. Upon approval of your event proposal, we will be able to:

- Offer advice and expertise on event planning and accepting donations
- Provide a letter of authorization to validate the authenticity of the event and its organizers
- Provide permission and promotional requirements for use of Terry Wahls MD Research Fund and UI Center for Advancement names and logos (details on page 8)
- Provide limited supplies, including Terry Wahls MD banners and fliers
- Provide tax receipts to donors who make checks payable to “Terry Wahls MD Research Fund” or “UI Center for Advancement”
- Provide gift recognition for donations as appropriate

THIRD-PARTY RESPONSIBILITIES

Because of our limited staff and resources, and to not associate liability to UI Center for Advancement, we are unable to provide support for all fundraising activities. We appreciate your gift of time and talent to help expand our fundraising efforts. Unfortunately, we cannot:

- Handle securing an appropriate venue or other services (e.g. food, entertainment)
- Provide on-site staff or volunteers at fundraising events
- Share UI Center for Advancement’s mailing lists, including donors, physicians, employees, volunteers, vendors or patients
- Promote and/or generate publicity on behalf of your event, nor provide photos to be used on promotional materials
- Provide insurance coverage, permits or licenses for your event
- Secure sponsorships for your event
- Provide funding for your event
- Guarantee attendance of staff or Dr. Wahls at your event(s), including subsequent check presentations or photo opportunities

Neither the UI Center for Advancement or Dr. Wahls assume liability for the planning or execution of your event.

DISCLAIMER:

The UI Center for Advancement reserves the right to adjust the contents of this packet to meet the needs of individual event circumstances. Those situations are evaluated internally and done so on a case by case basis.

It is expected that unless otherwise approved, all third-party event activities will adhere to the guidelines outlined in this packet.

FINANCIAL GUIDELINES

We have prepared the following information to help you understand your role and that of the UI Center for Advancement as it relates to the financial and tax regulations associated with planning a fundraiser. It is important to know that detailed accounting of event revenues and expenses is important for tax purposes.

EVENT EXPENSES

As the event organizer, you are responsible for finding sources of funding for the event, if necessary. Third-party expenses will not be processed by the UI Center for Advancement, including any and all bills associated with the event, and any credit or debit card transactions for the event.

The UI Center for Advancement expects that event organizers will not keep any portion of the event proceeds as profit or compensation for organizing the event. If event expenses are greater than the revenue generated, the UI Center for Advancement and Dr. Terry Wahls are in no way responsible for those costs.

EVENT BANKING

The UI Center for Advancement cannot serve as a bank for your event. There may be legal and tax implications for any individual who uses his or her personal bank account to process event revenues and expenses. Contact your legal advisor, tax advisor, or bank representative to advise you in this area.

EVENT TAXES

The event is responsible for paying all applicable federal, state, and/or local taxes incurred during the planning and execution of the event.

FEDERAL AND STATE TAX EXEMPTION

Because neither the UI Center for Advancement nor The Wahls Foundation is hosting the event, you will not be able to use the tax identification number assigned to these entities.

FINANCIAL GUIDELINES (CONTINUED)

DONOR INTENT

In order for the UI Center for Advancement to accept donations from your event, the promotions and solicitations for your event should clearly indicate the donors' intentions—that is, the purpose for which the funds are being raised.

The use of the “proceeds benefit” logos shown on Page 7 clearly indicates the purpose. In text, we recommend this statement: **“All proceeds from this event will benefit the Terry Wahls MD Research Fund through the University of Iowa Center for Advancement.”**

TAX TREATMENT OF DONATIONS

Your event staff is responsible for collecting all gift funds generated. Only checks made out directly to the UI Center for Advancement and/or Terry Wahls MD Research Fund may be classified as gifts to the advancement office. In this case, the advancement office will provide receipts for each check to the check issuers.

However, certain types of donations are not gifts, including:

- Payments to the event organizers for event participation, such as “entrance fees” or “suggested donations” or “sponsorships”
- Payments made by individuals that are used to defray event costs
- In-kind donations to your event (certain businesses may be able to treat such donations as business expenses in accordance with their own obligations).

AUCTIONS, RAFFLES, ETC.

If your event includes an auction, raffle, or similar gambling activity, please clearly state that intent in the “event details” section of the proposal form. Careful consideration must be given to these activities, which may require state-specific licenses and other compliance steps.

SUBMITTING NET PROCEEDS

To make a contribution to the Terry Wahls MD Research Fund from your event proceeds, please make the check payable to:

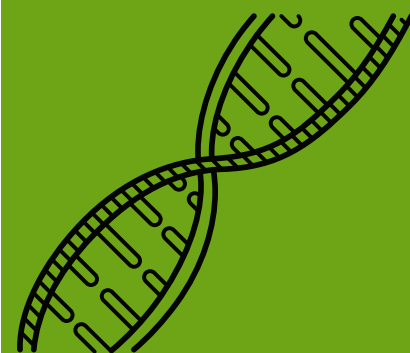
***Terry Wahls MD Research Fund
c/o UI Center for Advancement
PO Box 4550
Iowa City, IA 52244***

A receipt will be provided to the check issuer.

Matching Gifts

Many companies offer matching gift programs to support the charitable interests of their employees.

Please contact a member of the Internal Medicine development team if you have any questions about matching gift programs, donations or forms.



PROMOTIONAL REQUIREMENTS

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Terry Wahls MD Research Fund and the University of Iowa Center for Advancement brands are important to all of us. We take pride in our brand images and work hard to ensure the messaging connected to it is positive and consistent, because it reflects on the important work of our physicians, researchers, faculty, and staff.

As a volunteer third-party event host/organizer, you assume the responsibilities of adhering to Terry Wahls MD and UI Center for Advancement brand policies.

Upon approval of your event, development staff will send third-party event organizers detailed promotional guidelines outlining accepted ways to advertise and market your event.



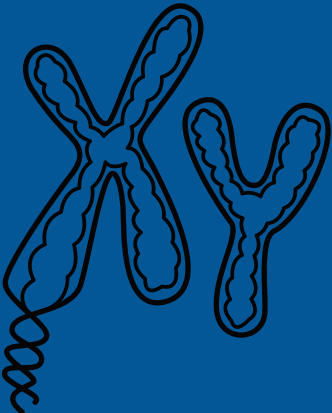
These guidelines include the following key points:

- All promotional materials should state that proceeds will benefit Terry Wahls MD Research Fund and in no way suggest Dr. Wahls or the UI Center for Advancement are in any way responsible for the event.
- Dr. Wahls and the UI Center for Advancement reserve the right to review all promotional materials and make changes in messaging to ensure that the language is consistent with branding guidelines.

LOGO OPTIONS

The logo on this page is available for use by approved third-party events. The logo is to be used as is and cannot be altered in any way. The logo shown below is the only logo available for use by third-party events. All materials using the Terry Wahls MD Research Fund at the University of Iowa logo must be reviewed and approved prior to use.

Determine your logo needs for your promotional materials. Once your event is approved, you will receive the requested logo in addition to the detailed promotional guide. The logo provided below and others in this toolkit may not be copied or otherwise used.



Third-Party Event Proposal Form

to benefit Terry Wahls MD Research Fund through the University of Iowa Center for Advancement



Host/Group/Company Planning this event: _____

Event Contact/Organizer's Name: _____

Address: _____

Email: _____ Phone: home cell work: _____

Name of proposed event: _____

Event location and address: _____

Date(s) & time(s): _____ This event is: By invitation only Open to the Public

Describe proposed event details, purpose, and target audience: _____

Describe any auctions, raffles or sponsorships: _____

Proposed event promotion and publicity: Press Releases Fliers Radio/TV Billboards Newspaper

Other: _____

Logos requested (from page 9): _____

Are there other beneficiaries besides the Terry Wahls MD Research Fund? Yes No

If so, please note percentage designated to each organization: _____

Will event organizers keep a portion of the event profits? Yes No

Do these persons have connections to a business that will benefit from the event? Yes No

If so, please explain: _____

Does your event involve a percentage of sales or dollar amounts of sales for a specific time period? Yes No

If yes, please provide the percentage or dollar amount to be donated. _____%

Will the percentage be taken out of the gross (total) or out of the net (after all expenses are paid) sales Gross Net

Please estimate: Total income: \$ _____ Total expenses: \$ _____

Estimated gift to Children's Hospital: \$ _____

Anticipated date of check submission (must be within 30 days of the event): _____

I, _____, agree on behalf of _____ that I understand the third-party event guidelines supplied by the University of Iowa Center for Advancement on behalf of the Terry Wahls MD Research Fund at the University of Iowa, and my responsibilities as a third-party event host pertaining to compliance of federal and state laws including, but not limited to, those concerning fundraising events. I promise to abide and adhere to all statements made in the stated guidelines and attest the information provided on this form is correct and accurately describe the proposed event.

Event host/organizer's signature: _____ Date: _____

UI Foundation approval: _____ Date: _____

Please complete and return this form at least **two months** before your proposed event or project. Only complete forms will be reviewed. Until a confirmation letter is received, contributions should not be solicited and the names Terry Wahls MD Research Fund at the University of Iowa or University of Iowa Center for Advancement, or any adaptation of, should not be used for any purpose. The center may withdraw approval at any time should we discover inappropriate messaging or behavior associated with the event. The event host will be notified of the approval withdrawal in writing. After approval is withdrawn, all references to the Terry Wahls MD Research Fund at the University of Iowa or the UI Center for Advancement and related departments and programs must be eliminated.