

# Baird & Warner Good Will Network FAQs

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## **Mission Statement:**

The Baird & Warner Good Will Network was established to leverage our ability to assist our neighbors by unifying the efforts of our entire team and pooling our area-wide resources. Collectively, our efforts are directed toward organizations focusing on shelter, particularly for families and children. Individually, we support a wide range of local charities and community initiatives. Together we are making a difference in the lives of people all over Chicagoland.

Through the Baird & Warner Good Will Network, we strive to meet our social responsibilities, help those in need, and serve as a model for other corporate citizens.

We support non-political and non-sectarian community organizations and charities that are duly recognized 501 ( c ) 3 charities by The Illinois Attorney General's Charitable Trust Bureau.

## **Q. We want to hold a special event in our office for our charity. How do we do this?**

- A. Effective May 20, 2004, all office events must be held under the auspices of the non-profit group your office is supporting. The Good Will Network will no longer “host” local office events. This means that any checks written by staff and agents in your office and the public are to be made payable to the non-profit you are supporting. You can then immediately turn over all the money you raise to the charity. Consequently, all tax acknowledgment letters will come from the non-profit. This is done so that the organization you are supporting can benefit from the money you raise immediately, no more waiting for checks to be sent from the Good Will Network fund. Please let the Home Office Good Will Network Coordinator know the total you have raised in your local office – so we can add it to the Good Will Network grand total. If you are interested in getting help with flyers, invites, troubleshooting, etc. email [goodwill@bairdwarner.com](mailto:goodwill@bairdwarner.com).

## **Q. Who should the checks be made payable to if I just want to send in a donation to the Good Will Network?**

- A. The Baird & Warner Good Will Network is a “donor fund” with the Chicago Community Trust Foundation (CCT), a duly recognized 501 ( c ) 3 charity. Because we are a fund of this not-for-profit organization all checks must be made payable as follows:

**CCF/B&W Good Will Network**

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## **Q. Does the company match my contribution to the Good Will Network?**

A. Yes, at several different levels.

1. If you are a sales associate or loan officer, \$10 from the top of each transaction is earmarked for the fund. You and Baird & Warner share in that contribution, based on your commission level. If, for example, you are at a 60/40 commission split, you contribute \$6, and the company contributes \$4, of the total \$10 donation.
2. If you make a personal donation directly to the general Good Will Network fund—not related to a specific event—Baird & Warner will match your contribution dollar for dollar.
3. If you are an employee and elect to make a contribution to the general Good Will Network fund each pay period, the company will also match your contribution dollar for dollar.

*Note: The company will NOT match any funds raised by and through special events, or contributed by the public-at-large.*

## **Q. Will the company match contributions if we want them to go to a specific organization?**

A. Yes, assuming that all of the following criteria are met:

1. The funds being matched are donations made by Baird & Warner sales associates or employees (not the public at large and not related to an event)
2. The specific organization(s) must have been designated by a Baird & Warner sales office, approved by the B&W Good Will Network Board of Advisors (within the past 24 months); and
3. The checks must be made payable to:  
**CCF/B&W Good Will Network**
4. The combined donation and match must total more than \$250 in order for a check to be issued by CCT directly to the local organization.

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**Q. I want to decide where my money is going. Is this possible?**

- A. That very enthusiasm and commitment to help Chicago area charities is how the Baird & Warner Good Will Network came to life.

On a local level, you can participate in your office' selection of charities by volunteering for your sales office's Good Will Network Office Advisory Committee. On a company level, you can volunteer to participate in the Good Will Network Board of Advisors and participate in policy-making and large grant decisions. This board reflects the interests of Baird & Warner community members and includes sales associates, managers and staff.

The Board of Advisors each year makes a certain amount of dollars available to each sales office to benefit the office's chosen (and approved) charity(s). Currently, that total amount is \$2,000.

**Q. What can our office's \$2,000 be used for?**

- A. This money can only be used as a donation to the charity(ies) selected by your office and approved by the Board of Advisors. This money can not to be used for expenses associated with fundraising or other activities. This money is intended to supplement or pair with the local office's efforts.

**Q. We will have event expenses that need to be paid. How do we handle them?**

- A. We have no budget for expenses. You need to consult in advance with the non-profit organization you are supporting about any expenses.

**Q. Can I have a receipt for the contribution I made to the Good Will Network for my tax records?**

- A. It depends on the kind of contribution you made.
1. If the contribution was made by and through a real estate transaction, you never paid tax on it in the first place. Your income has already been reduced because of your generous donation, which is exactly what would happen with a tax deduction. In effect, you have already taken the tax deduction -- without the paperwork.

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**Q. Can I have a receipt for the contribution I made to the Good Will Network for my tax records?** (continued)

2. If you wrote a check or made payroll deductions to the general Good Will Network fund, you will receive receipts for your tax records if your donation (pre-matching funds) exceeds \$25.
3. If you purchased something at a fundraising event and wrote a check for it, you will receive an acknowledgment from the non-profit organization your office is helping.

*Note: The IRS has very stringent reporting requirements in order to claim charity donations. Check with your tax preparer or accountant. In the case of items purchased at silent auctions, garage sales, etc., they are not considered charity donations as you received goods or services (or the value thereof); the same is true with tickets to charity events. Generally speaking you can only claim the amount that you paid over and above the actual value of the goods or services received. Again, it is your duty to seek and attain explanation or clarification of this by your tax preparer or accountant.*

**Q. Where and to whom do we send checks?**

- A. Send the checks via interoffice mail to the Good Will Network Coordinator, Home Office. If you are sending checks from an event, include them with the "Check Transmittal Form" (available on mybairdwarner.com).

**Q. Can I raise money and give it to an organization through the Good Will Network if the charity hasn't been approved by the B&W Good Will Network Board of Advisors?**

- A. Yes, so long as the charity is legitimate with a 501 ( c ) 3 status and meets the other Baird & Warner Good Will Network criteria (non-sectarian and non-political in affiliation). The funds contributed must total more than \$250 in order for a check to be issued to the local organization. However, this donation will not qualify for matching funds from Baird & Warner.

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**Q. What is the process to promote an event on mybairdwarner.com?**

- A. Send all the information about the event to goodwill@bairdwarner.com.

Please also communicate your event and fundraising project ideas with the Good Will Network Coordinator well in advance of implementation. They may offer or recommend ideas that could minimize your time commitment and maximize your results; as well as help promote your event or project on mybairdwarner.com. Keep in mind, stories on mybairdwarner.com that include photographs garner more interest. Take photographs of your committee meetings and of your event or project. The more information (and photos) you send the better chance you have of getting your event or project promoted on mybairdwarner.com.

**Q. How should we describe in correspondence?**

- A. All correspondence and communication asking for support, donations, etc., must include the following paragraph describing our charitable initiative:

Baird & Warner has a long history of supporting Chicago area charitable organizations. Since its founding in 1855, the sales associates, management team and staff of this family-owned company have been committed to civic and community involvement in the Chicagoland area. It was this long-standing commitment that led B&W to establish a donor advised charitable fund with the Chicago Community Trust. Introduced in early 2002, the Baird & Warner Good Will Network is a fundraising and volunteer service initiative that contributes primarily to community based organizations and projects that focus on providing shelter and related social services, particularly for families and children.

**Q. What company support is available for our office?**

- A. The Good Will Coordinator has direct responsibility for helping your office develop and coordinate fund raising and special event plans, and your office's contributions. Assuming your special event and/or project meets the criteria of the Good Will Network, you can expect:
- Design and marketing support
  - Coordination help with sponsors, promotions and public relations
  - Community relations support