ORGANIZATION PAYMENT ONBOARDING

DRAFT PROCEDURE — DO NOT SUBMIT SENSITIVE INFORMATION THROUGH THIS HTML DEMO

This worksheet outlines the information an approved organization will need to provide through a secure live onboarding portal. It is not a banking form or an IRS tax form.

ORGANIZATION RECORD

Legal organization name: _____

Organization type: _____

Authorized representative / title: _____

Mailing address: _____

Accounts payable email / phone: _____

REQUIRED VERIFICATION

☐ Confirm the registered organization and signatory authorization.

☐ Review and accept the finalized Fundraising Participation Agreement.

☐ Obtain the appropriate official IRS Form W-9 through a secure collection process, if applicable.

☐ Complete payee identity and payout-account verification via an approved secure payment provider.

☐ Confirm legal restrictions, nonprofit tax treatment, and any required reporting.

PAYOUT ACCOUNTING / DASHBOARD

Dashboard status: Booked → Provider verification → Earned → Approved for payment → Paid.

Only provider-verified qualified couples earn the $100 contribution. Payment timing, disputes, voids and adjustments will follow the final executed agreement. Member goals reflect internal attribution, not separate payments to children.

SECURE DOCUMENT HANDLING

Do not email unencrypted W-9s, bank account details, Social Security numbers or tax identifiers. Do not request banking information in a public website form or Google Sheet. Use role-limited secure upload and third-party payout onboarding, with audit logs, retention controls and verification of authorized payees.

OFFICIAL IRS W-9

Current official IRS forms and instructions: https://www.irs.gov/forms-pubs/about-form-w-9

Direct IRS W-9 PDF: https://www.irs.gov/pub/irs-pdf/fw9.pdf

Internal organizer copy — not a completed payee tax document.