

# **T-Serve Checkup**

## **Application Form**

T-Serve Foundation is a Kansas City area 501(c)(3) nonprofit that partners with other charitable organizations by providing financial support to offset their cost of accepting credit and debit card donations. In addition, T-Serve provides no-cost advisory services that help maximize an organization's efficiency in processing electronic transactions. The T-Serve Checkup program increases the impact of each card donation and helps promote a greater awareness of those business practices that can deliver eGiving success in today's world of tech-savvy donors. By submitting this application, you are requesting a partnership with T-Serve Foundation for the reimbursement of on-going merchant fees and related costs associated with accepting credit and debit card transactions. Typical T-Serve reimbursement grants range from \$4,000 to \$10,000 annually.

### **INSTRUCTIONS**

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- I. Gather your information sources and any requested attachments.
- II. Complete the form.
- III. Mail or email the completed form and any requested attachments to:

**T-Serve Foundation**  
**3745 W. 105th Terrace**  
**Leawood, KS 66206**  
**info@t-servefoundation.org**

#### **A Note Concerning Information Privacy**

**We consider the information that you provide to us on this form to be confidential and will not sell, transfer, or share this information with any other entity.**

## I. Organization Information

Legal entity name: \_\_\_\_\_

Year founded: \_\_\_\_\_

Name of CEO: \_\_\_\_\_

Name of CFO: \_\_\_\_\_

Name of primary contact: \_\_\_\_\_

Contact phone number: \_\_\_\_\_

Annual Revenue: Amount: \$ \_\_\_\_\_

Annual Contributions: Amount: \$ \_\_\_\_\_

Key fundraising activities:

## II. Payment Card Transaction Information

*\*Please attach a copy of your most recent Merchant Statement(s) to this form.*

Name of Payment Processor (Merchant Services provider):  
\_\_\_\_\_

Provider of payment software and payment swipe devices:  
\_\_\_\_\_

Brands of credit/debit cards accepted:

Visa     Discover     MasterCard     American Express     Other

What is your annual credit/debit card volume?

Card Not Present transactions (online)    Count: \_\_\_\_\_ ; Amount: \$ \_\_\_\_\_

Cards Present transactions (in person)    Count: \_\_\_\_\_ ; Amount: \$ \_\_\_\_\_

Automatic, recurring donations:    Amount: \$ \_\_\_\_\_

Annual merchant processing fees:    Amount: \$ \_\_\_\_\_