



## 3<sup>rd</sup> Party Fundraising

Thank you for selecting the Lone Survivor Foundation as the beneficiary of your fundraising event or activity (mutually referred to as 'event'). The Foundation relies on the willingness of individuals and organizations that generously initiate such events. We are truly honored you have selected us and we are grateful for your efforts.

*The Lone Survivor Foundation restores, empowers and renews hope for our wounded warriors and their families through health, wellness, and therapeutic support.*

Overseas deployments and combat action can take a serious toll on everyone involved - from the men and women on the front lines to the friends and families who wait patiently for their loved ones to return home. America's Armed Forces are asked to perform at exceptionally high standards in the most demanding circumstances and that service demands incredible sacrifice, dedication, and in some cases debilitating personal transformation. Transitioning to post-military life, whether wounded in combat or simply adjusting to the civilian sector, will often cause difficulty for the service member and his or her family. The unfortunate reality for many service members and their families is that life changes after the loved one returns home and the effects of their experiences begin to manifest in negative ways. In short, the normalcy of life prior to their service may have been lost forever.

Therefore, the Lone Survivor Foundation is here to help America's Wounded Warriors and their families adjust to the effects of their experiences and help them transition into what may be looked at as their 'new normal' – providing an understanding and acceptance of who they are as a person, a family and a community.

This packet contains the following information:

1. **Fundraising Protocols:** The Lone Survivor Foundation has established protocols for those seeking to plan events to benefit the Foundation. Please review these policies and guidelines carefully. Upon written approval of your proposal by the Foundation, the protocols become part of your agreement with the Foundation and you will be responsible for compliance.
2. **Fundraising Agreement:** If you or your organization would like to host an event to benefit the Lone Survivor Foundation, please complete the *3rd Party Fundraising Agreement* prior to executing plans for your event. We highly recommend a six (6) month minimum to ensure proper planning and execution on the part of the event organizer. The Agreement should be completed and signed by an authorized representative of your organization. For individual sponsored events, the primary individual should complete and sign as the authorized representative.
3. **Financial Summary:** Please complete the *3rd Party Fundraising Financial Summary* form and return it to the Lone Survivor Foundation within thirty (30) days following the close of the event.

As a final note, although we actively encourage third-party fundraising, we must approve in writing all events in advance as well as any support materials (print, electronic, etc.) that will include the Foundation's brand. Initial event submission review may take up to three weeks.

We appreciate your interest in fundraising for the Lone Survivor Foundation and we look forward to working with you. Please contact us with questions.

## Lone Survivor Foundation 3<sup>rd</sup> Party Fundraising Protocols

### Publicity

If the Lone Survivor brand is to be used in publicity and marketing materials, the Foundation must approve in writing any layout and design incorporating the logo prior to production and release.

The full name of the Foundation is the 'Lone Survivor Foundation' and the Foundation should be identified by its full name in the first reference in all materials pertaining to the event. The term 'Foundation' (capitalized) may be used sparingly after the first reference. Please do not use any other interpretation or variance of the Foundation name.

- The Lone Survivor Foundation may only be identified as the beneficiary of your event. For example, you should not call an event "The Lone Survivor Foundation Walk-a-Thon." Rather, the event should be promoted as the "Walk-a-Thon to Benefit the Lone Survivor Foundation" or "Walk-a-Thon Benefitting the Lone Survivor Foundation".
  
- Promotions for the event must reflect the Lone Survivor Foundation as the beneficiary, not the host, presenter, or sponsor (for example, "proceeds from this event will benefit the Lone Survivor Foundation").
  
- All promotional and support material must be clearly marked to indicate that the event is being held to benefit the Lone Survivor Foundation.
  
- Use of the Lone Survivor Foundation logo on any promotional materials including, but not limited to, advertising (electronic and print), letters, brochures, flyers and press releases, must be approved in writing by the Foundation. Please do not make public announcements or promote the event until you receive written approval from the Foundation of your fundraising proposal.
  
- Marcus Luttrell's name must not be used in any way that indicates endorsement, involvement or participation in the event. The following statement is the only instance in which Marcus Luttrell's name can be used on promotional materials: "The Lone Survivor Foundation is a Federal 501(c)3 Non-Profit Founded in 2010 by Navy SEAL (Ret.) Marcus Luttrell."
  
- Creation of websites, social media pages, or the like with any combination of the words 'Lone Survivor Foundation' is not permitted, nor is the Foundation's logo to be used as a representative image (profile picture, header image, etc.)
  
- If an approved *product or service* will be benefitting the Lone Survivor Foundation, adherence to required Better Business Bureau language is required. All collateral materials relating to the Promotion must specify: (a) that Lone Survivor Foundation is the benefiting organization; (b) that written information about Lone Survivor Foundation is available by calling 832.581.3592 or by visiting [www.lonesurvivorfoundation.org](http://www.lonesurvivorfoundation.org) and (c) the actual or anticipated portion of the sales or donation that will benefit Lone Survivor Foundation.
  
- If the event is having a featured speaker, MC, performers, etc., the Foundation requests review and approval to ensure alignment with Lone Survivor Foundation standards and ethics.

## Terms & Conditions of Logo Usage

1. Lone Survivor Foundation is the owner of certain federally registered and common law trademarks, trade names and service marks including the name Lone Survivor Foundation, as well as the wings and logo (collectively, the “Marks”). If (and only if) this proposal is approved by Lone Survivor Foundation, Promoting Organization will be granted a non-exclusive license to use specified Marks in publicity documents relating to the promotion. Promoting Organization may not alter or modify the Marks in any way, nor shall it grant a sublicense to any other person. The terms of the license granted hereunder shall be from the date Lone Survivor Foundation approves the Agreement until the conclusion of the promotion; provided, however, that Lone Survivor Foundation has the right to terminate the license if it determines, in its sole discretion that the quality of the Promotion is or will be injurious to Lone Survivor Foundation or the Marks.
2. Any use of the Marks is subject to the prior written approval of Lone Survivor Foundation. Accordingly, Promoting Organization agrees to submit to Lone Survivor Foundation for approval – prior to distribution, broadcast or publication thereof – all electronic and printed material, publicity releases and advertising relating to the Promotion which mentions Lone Survivor Foundation or contains any graphic elements associated with the Foundation.

## Event Approval and Foundation Assistance

Approval for the event is specific to the dates and location you indicate on the 3<sup>rd</sup> Party Fundraising Agreement. If you intend to repeat the event, you must submit a new request.

Please understand the volume of requests typically exceeds the number of Lone Survivor Foundation members available to attend events. While we will do our very best to provide the representatives you may have requested, we cannot guarantee attendance of staff, volunteers, or personnel at the event. If you would like to request a speaker or representative for an event, please provide the details on the 3rd Party Fundraising Agreement. All travel and lodging costs incurred by the speaker or representative will be the responsibility of the event organizers.

As requested and appropriate, the Foundation will provide brochures, pamphlets and other informational materials, promoting and explaining the Lone Survivor Foundation. Please let us know your needs in this area as soon as possible so we can make sure we have sufficient quantities for your event.

The Foundation is unable to provide its donor mailing lists to third-party fundraisers. Event organizers should have their own list of potential contributors or participants. As appropriate and approved, we will include your event in the Foundation’s electronic media outlets.

## Event Insurance

Event organizers must obtain their own liability insurance to cover the event. If a liquor license is required, it is the responsibility of the event organizers to obtain such license. Please add the ‘Lone Survivor Foundation, Inc.’ as an additional insured to your insurance policy. A copy of the Certificate of Endorsement page needs to be forwarded by one of following three methods.

Email: [events@lonesurvivorfoundation.org](mailto:events@lonesurvivorfoundation.org)

Fax: (832) 581-3593

Mail: Lone Survivor Foundation

ATTN: 3<sup>rd</sup> Party Fundraising Processing  
2626 S. Loop. W. Suite 415  
Houston, TX 77054

## **Solicitation of Corporate Donations, Sponsorships and In-Kind Donations**

Over the years, the Lone Survivor Foundation has received generous donations of funds and services from the community. In order to better coordinate fundraising events, we ask that you provide us with a list of targeted sponsors for your event before they are approached. Please remember that many individuals and businesses already support the Foundation and may not wish to make additional donations.

## **Event Expenses and Income**

If you must buy goods for the event, or if expenses will be incurred, please consider the following:

- Determine whether or not the event will generate enough income to reimburse you for the expenses.
- The Lone Survivor Foundation is unable to reimburse you for the purchase of goods and services for your event.
- The event planner/host may not take a fee, commission, or salary from the event.

As a general rule, since the Lone Survivor Foundation is not sponsoring your event, the Foundation cannot be responsible for managing the event's revenues and expenses. Only the net amount (final net proceeds) will be processed by the Foundation. In special cases, the Foundation may make exceptions to this rule.

- Financial accounts set-up in the name of the Lone Survivor Foundation are not permitted.
- As a fundraiser being promoted as benefitting the Lone Survivor Foundation, all proceeds (net revenue), after deducting expenses, must be sent to the Foundation.
- If you are deducting expenses before sending net proceeds to the Foundation, you may not state or imply to your donors that any funds given to you are tax-deductible. A donation solicited on our behalf is fully tax-deductible only when it is made directly and entirely to the Lone Survivor Foundation.

## **Donations**

Event Participants may wish to make a donation to the Foundation, in addition to any admission purchase, auction item purchase, etc.

- Checks made payable to the Lone Survivor Foundation must be sent to the Foundation for processing immediately following the event.
- Only checks made payable to the Lone Survivor Foundation will be provided with a tax-deductible acknowledgement letter.
- If cash donations are taken (which is discouraged) and donors request an acknowledgement of their gift for tax purposes, the following legible information must be collected and reconciled with the proceeds given to the Foundation: name, address, amount given and date given. Collection of information is the sole responsibility of the event organizers.

## Considerations for events projected to net over \$25,000

If the event is projected to a magnitude that expenses and revenues are determined to best be held and processed by the Foundation (by mutual agreement), the following additional points are to be followed and agreed to by the event organizers. The same protocols will become part of the *3rd Party Fundraising Agreement*. Any additional and/or modified protocols not stated here will be included in an approval letter from the Foundation.

- The Foundation must have a minimum of six months (nine to twelve months preferred) notification of the event to ensure appropriate planning and capacity.
- Expenses must be targeted no greater than 40% of gross revenues to keep within the Foundation's fiduciary responsibilities. A mutually agreed upon budget must be presented by the event organizer. Expenses and revenues must be monitored and managed throughout the planning and execution of the event to stay within the previously stated ratios. Mutually agreed adjustments will be made to stay within the same ratios.
- All expenses must be appropriately forwarded to the Foundation contact in a mutually agreed timely manner.
- All revenues must be appropriately forwarded to the Foundation contact in a mutually agreed timely manner and/or through the agreed mechanisms (i.e.: on-line donation portal, U.S. mail, etc.).
- Appropriate and mutually agreed reporting will be formalized.
- As appropriate and mutually agreed, additional and/or modified protocols may be required.

**Lone Survivor Foundation**  
**3<sup>rd</sup> Party Fundraising Agreement**

Please complete this form for consideration of your event. Questions should be directed to the Foundation at (832) 581-3592 ext. 3 or [events@lonesurvivorfoundation.org](mailto:events@lonesurvivorfoundation.org).

**Responsible Party Sponsoring Event (signatory of agreement)**

Name of Sponsoring Organization or Individual \_\_\_\_\_

Individual Name / Title (if not individual above) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Mobile (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

E-Mail \_\_\_\_\_ Fax (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Website \_\_\_\_\_

**Primary Contact for Event (if different than above)**

Individual Name / Title \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Mobile (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

E-Mail \_\_\_\_\_ Fax (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

## Event Description

Event Name \_\_\_\_\_

Description of event including any fees charged for admission or goods and services.

\_\_\_\_\_

Inclusive Dates \_\_\_\_\_ Location(s) \_\_\_\_\_

Start Time \_\_\_\_\_ End Time \_\_\_\_\_

Address of Event \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Expected Number of Participants/Patrons: \_\_\_\_\_

Do you have a committee? Yes  No  (Please attach committee list)

How do you wish to use the Lone Survivor Foundation name and/or logo? (solicitation letters, invitations, flyers, press releases, website, etc.)

\_\_\_\_\_

*NOTE: The Lone Survivor Foundation must approve all support materials prior to production and use. Please see the Lone Survivor Foundation 3rd Party Fundraising Protocols for additional information.*

What is your plan for promoting/advertising the event?

\_\_\_\_\_

Names of featured speakers, MC, performers, etc.

## Lone Survivor Foundation Support

Foundation representatives requested for event? Yes  No

If yes, how many hours? \_\_\_\_\_

Describe the activities requested of Foundation representatives.

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*Due to the high volume of requests, we cannot guarantee Foundation representatives.*

Public Speaker? Yes  No  Please provide details.

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For events projected to net over \$5,000 - would Lone Survivor Foundation brochures be useful to your event? Yes  No  If yes, please indicate quantity \_\_\_\_\_

Would you like the event listed on Lone Survivor Foundation electronic outlets?

Yes  No

Additional information the Foundation should know regarding your event or other requests?

## Financial

Will the proceeds from your event be donated solely to the Lone Survivor Foundation?

Yes  No  If no, what other charities are involved and what is the allocation percentage?

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Projected Gross Revenue \$ \_\_\_\_\_

Projected Expenses \$ \_\_\_\_\_

How will funds be raised?

Pledges  Auction  Ticket Sales  Donations

Other  (please explain)

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Are you approaching sponsors for the event? Yes  No

If yes, please list individuals and organizations to be solicited.

## Acknowledgement

*Responsible party must initial each of the nine following acknowledgements.*

\_\_\_\_\_ I have read and agree to comply with the Lone Survivor Foundation *3<sup>rd</sup> Party Fundraising Protocols*. I understand that the Protocols are a part of this Agreement. I also understand that any additional protocols included in the Foundation Approval Letter become a part of this Agreement.

\_\_\_\_\_ I understand that this is a proposal and I may not execute the event without prior written approval by the Lone Survivor Foundation.

\_\_\_\_\_ I understand that publicity and other marketing materials for the event must be approved by the Lone Survivor Foundation prior to being produced and released.

\_\_\_\_\_ I understand that I am being granted permission to use the Lone Survivor Foundation logo (brand) and will not distort the graphics or display in an inappropriate, unapproved manner.

\_\_\_\_\_ I understand that I cannot use language that indicates that Marcus Luttrell endorses, will be present, or have involvement at or with the event.

\_\_\_\_\_ I understand that any featured speakers, MC, performers, etc. must be reviewed and approved by the Lone Survivor Foundation.

\_\_\_\_\_ I have read and understand that I must return the *3<sup>rd</sup> Party Fundraising Financial Summary* form to the Lone Survivor Foundation within thirty (30) days of the end of the event.

\_\_\_\_\_ I agree to indemnify and hold harmless the Lone Survivor Foundation, its directors, employees and legal representatives, for any expenses, losses, claims or damages resulting from the fundraising event or the noncompliance with any term or provision of the Lone Survivor Foundation. Furthermore, I understand Lone Survivor Foundation insurance will not cover *3<sup>rd</sup>* party events nor will the Foundation be listed as a co-insured on any co-existing event.

## Signatory of Agreement

I have carefully read and fully understand the Lone Survivor Foundation 3<sup>rd</sup> Party Fundraising Protocols and Agreement. I am aware a letter of approval must be issued by the Lone Survivor Foundation prior to conducting this event, am I aware the initial event submission review may take up to three weeks.

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**Signature** (for electronic submission, your typed full name on this line serves as your signature)

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**Printed Name**

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**Title**

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**Organization Name**

---

**Date**

On behalf of everyone the Lone Survivor Foundation serves, our staff and Board of Directors wish to thank you once again for reaching out to us and helping us achieve our mission. We cannot possibly provide our wounded veteran community all that is needed without your generous support.

Please return the completed packet by one of the following three methods:

Email: [events@lonesurvivorfoundation.org](mailto:events@lonesurvivorfoundation.org)

Fax: (832) 581-3593

Mail: Lone Survivor Foundation  
ATTN: 3<sup>rd</sup> Party Fundraising Processing  
2626 S. Loop W. Suite 415  
Houston, TX 77054

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For Office Use Only

Date Reviewed \_\_\_\_\_ Approved  Not Approved

By \_\_\_\_\_ 30 day tickler date \_\_\_\_\_

**Lone Survivor Foundation**  
**3<sup>rd</sup> Party Fundraising Financial Summary**

Please complete within thirty (30) days of the close of your event and forward as indicated below.

\_\_\_\_\_  
**3<sup>rd</sup> Party Fundraising Event Name**

\_\_\_\_\_  
**3<sup>rd</sup> Party Fundraising Primary Contact**

\_\_\_\_\_  
**Date of 3<sup>rd</sup> Party Fundraiser**

\$ \_\_\_\_\_  
**Income**

\$ \_\_\_\_\_  
**Expenses**

\$ \_\_\_\_\_  
**Net Income (proceeds)**

Please mail the proceeds from your event along with this form and any other support documentation for proper donor acknowledgement within thirty (30) days following the close of the event to:

Lone Survivor Foundation  
Attn: 3rd Party Fundraising Processing  
2626 S. Loop W. Suite 415  
Houston, TX 77054

Please make checks payable to 'Lone Survivor Foundation'
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[www.lonesurvivorfoundation.org](http://www.lonesurvivorfoundation.org) Phone: (832) 581-3592