

PHILANTHROPY SOUTHWEST 2018 Membership Dues

Foundation Name: _____ **Date:** _____

Philanthropy Southwest dues for your foundation are determined by AVERAGING either your **disbursements** for charitable purposes (IRS 990PF, Part I, Line 26d) or **program services expenses** of your foundation (IRS 990, Part IX, Line 25B), over the past three fiscal years. Based on your foundation's annual tax return, please provide the following information for the most recent three years.

\$ _____	+	\$ _____	+	\$ _____	= Total/3 = _____
Year 1: _____		Year 2: _____		Year 3: _____	3-YEAR AVERAGE*
Disbursements or		Disbursements or		Disbursements or	(3-year total divided by 3)
Program Services Expenses		Program Services Expenses		Program Services Expenses	

After calculating your three-year average, determine your dues according to the following schedule:

Please check the correct dues category and, if you choose, grant information below.

<u>Three-Year Average:</u>	<u>2018 Membership Dues:</u>	
Less than \$250,000	\$ 450.00	<input type="checkbox"/>
\$250,000 to \$499,999	\$ 600.00	<input type="checkbox"/>
\$500,000 to \$1 million	\$1,150.00	<input type="checkbox"/>
\$1 million to \$2 million	\$1,700.00	<input type="checkbox"/>
\$2 million to \$4 million	\$2,300.00	<input type="checkbox"/>
\$4 million to \$6 million	\$3,500.00	<input type="checkbox"/>
\$6 million to \$10 million	\$4,250.00	<input type="checkbox"/>
\$10 million to \$20 million	\$5,000.00	<input type="checkbox"/>
\$20 million to \$50 million	\$6,000.00	<input type="checkbox"/>
More than \$50 million	\$7,500.00	<input type="checkbox"/>

2018 Annual Dues: \$ _____

IMPORTANT: Please indicate amount you are designating toward each of the categories below:

DUES: _____ *or* **GRANT:** _____ + **GIFT:** _____ = **TOTAL: \$** _____

DUES: Membership fee based on the schedule above.

GRANTS: A grant in lieu of dues made in support of Philanthropy Southwest equal to, or in excess of, the membership dues amount. Members making such grants will be provided with a letter of acknowledgement.

ADDITIONAL GIFT: A contribution toward the support of Philanthropy Southwest in addition to membership dues.

Important for Community Foundations:

* *Community Foundations may choose whether or not to include "pass through" funds when calculating the three-year average of a community foundation's disbursements. "Pass through" funds are defined as funds which reside with the foundation for less than one year or are not reflected in the fair market value of the community foundation's assets at year end.*

**Please return completed form with check made to:
Philanthropy Southwest, 8350 N. Central Expressway, Suite M-1012, Dallas, TX 75206**