



Protection of Donor Confidentiality Policy

In order to foster a giving environment in which trust and inclusion prevails, the Federation will enforce a Donor policy highlighting the right of the Donor to privacy in the transaction:

- 1- Donors have the right to remain anonymous, and all officers, Board members, employees or Campaign volunteer solicitors are bound to respect that right. Should the donor choose to remain anonymous, his/her name will not be included in any public listing of contributors – except as demanded by IRS regulations as part of the Federation’s annual Tax filing under 501©3 regulations.
- 2- Donors have the right to privacy regarding the amount of their gift. Should the Donor choose to keep the amount of their gift confidential, all officers, Board members, employees or Campaign volunteer solicitors are expected to respect his/her wishes. The Donor’s name will not be listed in any published donors’ list showing level of giving, be it by specific amounts or by giving levels.
- 3- Confidential information: All information exchanged during the solicitation process relating to personal or family circumstances, be it of financial nature or otherwise is to be considered confidential and not to be shared.
- 4- All donors will be specifically asked if they wish to remain anonymous and/or they wish to keep their giving level confidential. Their preference will be so stated on the pledge card and honored except in those cases where IRS regulations demand the disclosure of Donor’s names.
- 5- Solicitors are expected not to share any Donor giving history information that they might become privy during the process. The information is provided to them to the sole effect of facilitating the solicitation.
- 6- The Federation will share giving information as required by IRS or State of Texas regulations applicable to 501©3 corporations. The IRS requires, as of 2013, the disclosure of information on donors contributing \$ 25,000 or more to the organization. This information will be shared only in the context of filing the appropriate tax forms with the tax authority.