2017 Innovator Award

Foreign Public Charity Equivalence Affidavit of Officer

The undersigned, to assist grantmaking foundations in the United States of America to determine whether Institution name (the "Grantee") is the equivalent of a public charity described in section 509(a)(1) or (2) of the United States Internal Revenue Code, makes the following statement:

1. **Office.** I am the Official title of the Grantee.

2. **Formation and purposes.** The Grantee was created in Year by Name of governing document (e.g. trust agreement or charter and is operated under the laws of Country exclusively for the following purposes [check all applicable boxes]:

   ☐ Charitable
   ☐ Religious
   ☐ Scientific
   ☐ Literary
   ☐ Educational
   ☐ Fostering national or international amateur sports competition
   ☐ Prevention of cruelty to children or animals

3. **Programs and activities.** The Grantee's programs and activities have included and will include the following:

Describe past, current and future activities or attach descriptive materials

4. **Governing documents.** We have attached copies of the charter, bylaws, and other documents under which the Grantee is governed. We have also attached English translations of these materials if their original language is other than English.

5. **No improper private benefit.** Under the applicable laws and customs or under the Grantee's governing instruments, none of Grantee's income or assets may be distributed to, or applied for the benefit of, a private person or non-charitable organization other than (a) as part of the conduct of the Grantee's charitable or educational activities, or (b) as payment of reasonable compensation for services rendered, or (c) as payment representing the fair market value of property which the Grantee has purchased.

6. **No proprietary interest in Grantee.** The Grantee has no shareholders or members who have a proprietary interest in its income or assets.

7. **Distribution of assets on dissolution.** Under the applicable laws and customs, or under the Grantee's governing instruments, all of its assets will be distributed upon its dissolution or liquidation to another not-for-profit organization for charitable, religious, scientific, literary, or educational purposes, or to a government instrumentality. We have attached a copy of the relevant statutory law or provisions in the Grantee's governing instruments controlling the distribution of the Grantee's assets on dissolution or liquidation.

8. **Limits on activities.** Under the laws and customs applicable to the Grantee, or under the Grantee's governing instruments, the Grantee is not permitted, other than as an insubstantial part of its activities, to:

   (a) engage in activities that are not for religious, charitable, scientific, literary, or educational purposes; or

   (b) attempt to influence legislation, by propaganda or otherwise.

9. **No candidate campaign activity.** The laws and customs applicable to the Grantee do not permit it to participate or intervene, directly or indirectly, in any political campaign on behalf of, or in opposition to, any candidate for public office.

10. **Control by other organizations.** The Grantee is [choose one]:

☐ Not controlled by, or operated in connection with, any other organization.

☐ Controlled by or operated in connection with one or more other organizations, as follows:
Please describe

11. **Qualification as a public charity.** The Grantee is not a private foundation because it is [check any of the following that apply]:

☐ An educational organization that normally maintains a regular faculty and curriculum and normally has a regularly enrolled body of pupils or students in attendance at the place where its educational activities are regularly carried on and that has adopted and operates pursuant to a racially nondiscriminatory policy as to students.

☐ An organization the principal purpose or functions of which are the provision of medical or hospital care or medical education or medical research, if the organization is a hospital, or if the organization is a medical research organization, directly engaged in the continuous active conduct of medical research in conjunction with a hospital.

☐ Neither of the above, but an organization that satisfies a public support test as demonstrated by the Schedule of Financial Support for the five most recently completed taxable years, attached.

12. **Authorization.** The Governing body (e.g. board of directors) of the Grantee has authorized me to make this Declaration and affirms its contents.

13. **Binding representations.** The representations made in this Declaration are binding on the Grantee.

I declare that the foregoing is true and correct of my own knowledge.

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Signature of Declarant

Name of declarant

SCHEDULE OF FINANCIAL SUPPORT
PART ONE

Grantees that have existed for at least 5 years should complete this schedule for the 5 most recent fiscal years. Grantees that have existed for less than 5 years should provide actual figures for completed fiscal years, if any, and complete the remaining columns on the chart with their good-faith estimate of their expected future revenue sources. New organizations must provide at least three years of actual and/or estimated financial information.

Please Review Notes to Schedule of Financial Support on Page 8. ***Please complete according to the accounting method (i.e., cash- or accrual-basis) that your organization regularly uses.***	**Grantee's fiscal year ends on:** day **of** Month					
	The most recently completed fiscal year[1]	**Complete these columns with figures from prior fiscal years, if any, or succeeding fiscal years as described above. Please fill in the year at the top of each column.**				
		Year	Year	Year	Year	**TOTAL**
1. Gifts, grants, and contributions	value	value	value	value	value	value
2. Membership fees	value	value	value	value	value	value
3. Gross receipts from admissions, merchandise sold, services performed, or facilities provided (only from activities whose conduct is related to the exempt purposes of the organization)[2]	value	value	value	value	value	value
4. Gross income from interest, dividends, rents, and royalties[3]	value	value	value	value	value	value
5. Net income from business activities that are unrelated to the organization's exempt purposes[4]	value	value	value	value	value	value
6. Value of services or facilities furnished by a government unit without charge[5]	value	value	value	value	value	value
7. Total of lines 1 through 6	value	value	value	value	value	value
8. Line 7 minus line 3	value	value	value	value	value	value
9. Two percent of the total for line 8						value
Complete Part TWO; then complete the rest of Part ONE.						
10. Total from Column C, Part TWO						value

11. Public support -- Five-year total of line 8 minus the five-year totals of lines 4, 5, and 10						value
12. Public support percentage -- line 11 divided by line 8						% value

SCHEDULE OF FINANCIAL SUPPORT
PART TWO

Instructions: Complete one line for each person or organization whose total contributions during the entire five-year period are greater than the amount on Line 9, Part ONE (previous page).[6] *In Column A, identify each donor by name or otherwise. In Column B, enter the total amount donated by that person or organization during the five-year period. In Column C, enter the difference between the amount on Line 9, Part ONE, and the amount entered for that donor in Column B. Add the amounts entered in Column C, and enter the total for Column C on Line 10, Part ONE.*[7]

A. Identification of Donor	B. Total Contributed	C. Excess Contributions
name	value	value
name	value	value
name	value	value
name	value	value
name	value	value
name	value	value
name	value	value
name	value	value
name	value	value
name	value	value
name	value	value
name	value	value
name	value	value
name	value	value
TOTALS	**value**	**value**

NOTES TO SCHEDULE OF FINANCIAL SUPPORT
PART ONE

1. *General Instructions.* If the Grantee has existed for five or more years, please complete the financial support schedule for the most recent five fiscal years. If it has existed for more than one year, but less than five years, please complete the support schedule for each year in existence and provide projections of its likely financial support based on a reasonable and good-faith estimate of its future finances for a total of three years of financial information. If the Grantee has existed for less than one year, please provide projections of its likely financial support for the current year and the two following years, based on a reasonable and good-faith estimate of its future finances for a total of three years of financial information.

2. *Line 3:* Under U.S. tax law, a charity is not taxed on the income it receives from performing those services or functions whose conduct is substantially related to the charity's accomplishment of its charitable goals. For example, a hospital pays no tax on the fees paid by patients for their health care. This rule focuses on the activity that generates the income, not on the use to which the charity puts the income. If the conduct of the activity is not itself related to the charity's exempt purpose, then -- unless some statutory exception applies -- the income will be taxed at the same rates that apply to the income of for-profit enterprises.

3. *Line 4:* This category includes gross income from passive investments, such as interest, rents, dividends, and royalties.

4. *Line 5:* This category includes net income from business activities that are unrelated to the Grantee's exempt purpose.

5. *Line 6:* This category includes the monetary value of services or facilities provided to the Grantee by a governmental agency, beyond the services or facilities which would ordinarily be provided to the general public.

PART TWO

6. *Column A:* This column should only include the names of donors that are not considered "publicly supported." Government agencies are considered publicly supported for this purpose, and the Grantee may include grants from government agencies in full.

7. If two or more donors are related, their contributions must be aggregated for purposes of determining the excess contribution amount in Column C.

8. *Columns B and C:* Take the following example. Assume that amount on Line 9, Part ONE equals $20,000. The donor "ABC Foundation" made a total of $45,000 in grants over the five-year period as follows: $5,000 in 2001, $5,000 in 2002, $10,000 in 2003, and $25,000 in 2004. Total Contributed in Column B = $5,000 + $5,000 + $10,000 + $25,000 = $45,000. Excess Contributions in Column C = $45,000 - $20,000 = $25,000. Part TWO would be completed as follows:

A. Identification of Donor	B. Total Contributed	C. Excess Contributions
ABC Foundation	$45,000	$25,000