



EmbarkSM Fulfillment

Any campaign effort is useless if an organization raises funds but fails to collect them. OmegaFi has an enviable track record in this area, having collected more than \$2.5 billion for non-profits nationwide. Let us do all of the busy work — sending pledge reminders and thank-you letters, depositing checks, processing credit cards and more.

Embark now, and spend that extra time on what you'd rather be doing.

Program Details

Collect payments, contributions, fees and other funds from supporters

- Send pledge reminders, gift confirmations, thank-you letters and charitable gift receipts
- Compatible with 501(c)(3) educational foundations, 501(c)(7) house corporations, alumni associations and other business entities
- Direct all gifts sent to OmegaFi's office
- Deposits made every business day via ACH transfer or actual check transmittal
 - » In the case of direct deposit contributions: deposit collected funds into an escrow account then transfer any funds collected or received, less OmegaFi's fee and expenses, to one predetermined financial institution account
 - » In the case of pass-through contributions: collect checks and send them to one designated recipient
- Acknowledge each gift received
- Implement and maintain a system for follow-up necessary to keep pledge payments up-to-date
- Post the names of individuals contributing to the OmegaFi-developed campaign website
- Gift tracking by solicitor and contribution source
- Monthly detailed reporting:
 - » daily deposits by gift source and type
 - » new pledges and new contributions received
- Provide additional reports as needed, such as:
 - » aging reports
 - » cash flow projection
 - » campaign donors by source and solicitor
- Officer transition for new undergraduates and alumni

Donor Contribution Methods

- Mail
- Phone
- Online
- Auto-charging a credit card
- Auto-debiting a bank account

Donor Payment Flexibility

- Cash
- Check
- E-Check
- Money Order
- American Express
- Discover Card
- MasterCard
- Visa
- Stock transfer (in certain circumstances)
- In-kind gift recognition
- Through estate planning vehicles (bequest, life insurance, beneficiary designation, trust, etc.)

Donor Billing Options

- Annually
- Semi-annually
- Quarterly
- Bi-monthly
- Monthly

Program Benefits

- **Fast Access to Funds:** Spend or earn interest on the funds you raise within 24 hours. No other firm gets your money to you as fast.
- **Enhanced Brand Stature:** Our reminders, receipts and thank-you letters present a professional, polished image of your organization.
- **Consistent Oversight:** OmegaFi keeps your program running from one year to the next in the midst of undergraduate and alumni officer elections and changes in ability, attitude and enthusiasm.

Program Terms

- No long-term contract
- Pay on a month-to-month basis for as long as you like
- Lump-sum billing; OmegaFi does not charge postage, printing or other expenses to maintain this program
- Fees are billed monthly and/or per transaction