

Formal Meeting Request

(Your Foundation's Letterhead)

(Date)

[To a Representative]
The Honorable [insert full name]
U.S. House of Representatives
[Insert District Office Address]

[To a Senator]
The Honorable [full name]
United States Senate
[Insert State/District Office Address]

Re: Request for a Meeting

Dear Representative or Senator **[insert last name]**:

On behalf of the foundations in your state **[or district]**, I am writing to request the opportunity to meet with you while you are back in **[insert state]** this August.

[Personalize here: introduce yourself, your foundation and summarize foundations in the congressional district or state] Example: I am Executive Director of the Jones Foundation, which has \$25 million in assets. We make grants totaling \$2 million annually, mostly in Ohio. The most recent data indicates that there are 24 grantmaking foundations in your district **[or state]** with combined assets over \$120 million, making grants annually of \$7.5 million.

During our meeting with you, we would like to talk about our work and share our views on several policy issues affecting foundations being considered by Congress, including:

- **Supporting a flat, revenue-neutral private foundation excise tax**
- **Maintaining current law on charitable deduction rates.** President Obama's fiscal 2010 budget calls for tax changes that would reduce the value of itemized deductions which families earning more than \$250,000 or individuals earning more than \$200,000 can take for charitable donations. Specifically, the budget proposes to cap the tax benefit at 28 percent for itemized charitable deductions.
- **Supporting the expansion and extension of the IRA charitable rollover** to include gifts above \$100,000 and allow taxpayers to make distributions to donor advised funds, supporting organizations, and private foundations in addition to traditional charities.
- **Become a member of the philanthropy caucus in the House and in the Senate.**

I will call your **[insert name of community where office is located]** office to confirm receipt of this letter and to speak with your scheduler about a specific meeting date and time. Thank you in advance for the opportunity to meet with you.

Sincerely,

cc: _____ **[insert name of tax aide]**

Event Invitation

[Insert Date]

The Honorable [insert member full name]
United States Senate/ House of Representatives
[\[Insert district office address\]](#)

Dear [insert member last name]:

On behalf of the **[insert community foundation name]**, located in **[insert city and state]** I am pleased to invite you to **[insert event name]** to be held in **[insert location, date and time of event]**. **[Provide a brief overview of the purpose of the event]**. **[Insert your foundation name]** has **[insert number of assets]**. Last year, we made grants totaling **[insert monetary figure]**. Our most recent data indicate that there are **[insert number]** grantmaking foundations in the state of **[insert state]**. We expect **[insert approx number of attendees to event]** local community foundations leaders and our grantmaking partners to attend this event to support our continued efforts to promote the work of philanthropy in our local communities.

Your attendance at this event will provide you with a deeper understanding of how foundations play a pivotal role in the prosperity of communities across the nation. For years, foundations have been providing resources to communities to reach their full potential and keep current with economic and competitive trends. Recently, the **[insert foundation name]** provided funding to the **[insert community name]** **[Insert paragraph of where some of the monies have been allocated to benefit the community via donor-advised funds held at local foundations]**.

It is important that we recognize and continue to protect the growth of philanthropy for future generations. I sincerely hope you will consider accepting our invitation. Please have a member of your staff contact me directly at **[insert telephone and email information]**, if you require additional information.

I will call your district office to confirm receipt of this letter and to speak with your scheduler about your availability. I look forward to meeting with you and your staff on **[insert date of event]**.

Sincerely,
[Insert your name, foundation name, mailing address, and telephone number]

cc: _____ **[insert name of tax aide]**