

# Checklist – Required Information to be Disclosed During a Charitable Solicitation

This publication is intended to provide general information only and is not a substitute for legal advice.

The *Charitable Fund-raising Act* (CFRA) and Regulation set out the rules that must be followed when charitable organizations ask Albertans for donations. A key responsibility is disclosing information to donors in accordance with the legislation.

Further information is available in the Tipsheet “Charitable Organizations That Solicit Donations.” The Tipsheet is available under “Charities” on the following website: <https://www.alberta.ca/consumer-business-tips.aspx>.

The checklist below is provided to help charitable organizations follow the legislation. Charitable organizations that raise, or intend to raise, \$25,000 or more per year must provide the information in the checklist below to each potential donor.

A person who makes a solicitation face-to-face must provide the information to the potential donor before accepting a donation. A person who makes a solicitation by telephone, television or other media may provide the required information in written form.

	<b>INFORMATION REQUIRED BY SECTION 6 CFRA &amp; SECTION 4 OF THE REGULATION</b>	<b>YES</b>	<b>NO</b>	<b>NOTES</b>
a)	The name of the charitable organization making the solicitation or on whose behalf the solicitation is being made.			
b)	The charitable purpose for which contributions will be used.			
c)	The charitable organization’s estimate of the costs of making the solicitations and the activities directly related to making the solicitations (estimates must be provided one after the other with no intervening information in between). <ul style="list-style-type: none"> <li>the estimate of contributions that it will receive.</li> </ul>			
d)	The address of the charitable organization and, if incorporated, the place of incorporation.			
e)	The name and telephone number of a contact person in the charitable organization to whom			

Visit [Register a charitable organization | Alberta.ca](https://www.alberta.ca/register-a-charitable-organization) for more information.

	the person being solicited may direct any inquiries.			
f)	<p>If the charitable organization uses a fund-raising business to make solicitations on its behalf, or to manage or be responsible for solicitations made by or on behalf of the charitable organization:</p> <ul style="list-style-type: none"> <li>• the operating name and full legal name of the fund-raising business and</li> <li>• how the remuneration of the fund-raising business is determined.</li> </ul>			

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