2021 Bankers Life Forget Me Not Days®

Event Planning GUIDE

Since 2003, Bankers Life has helped raise over $6 million for the Alzheimer’s Association®
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Bankers Life Forget Me Not Days® is our signature charitable giving event to benefit the Alzheimer’s Association®. Annually, agents and associates hit the streets to raise money and awareness. In exchange for a contribution, donors receive packets of Forget-Me-Not flower seeds to be planted in honor of the more than 5 million people living with Alzheimer’s disease.*

Our 19th annual Forget Me Not Days fundraising campaign in honor of National Alzheimer’s and Brain Awareness Month, and in partnership with the Alzheimer’s Association’s The Longest Day fundraiser, will be held in June 2021. Nationwide, offices should use online fundraising tools to collect donations throughout the month.

One hundred percent of donations collected fund the care, support and research efforts of the Alzheimer’s Association®.

**About The Longest Day**

The Longest Day fundraiser is an activity that helps fuel the care, support and research efforts of the Alzheimer’s Association®.

The Longest Day® is the day with the most light—the summer solstice. On June 20, thousands of participants from across the world come together to fight the darkness of Alzheimer’s through an activity of their choice. While the most promotion will occur on June 20, participants may choose to fundraise through June and July.

Bankers Life Forget Me Not Days campaign aligns as a Global Team for The Longest Day fundraiser.

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KICK START your office’s fundraising campaign!

Recruit members of your office to form a planning committee

Roles include:

- **TEAM CAPTAIN**: "face" of your campaign, in charge of registering your office’s team at [alz.org/FMND](http://alz.org/FMND), and communicates with local Alzheimer’s Association chapter. *In the case that a Logistics and Communications Chair is not delegated, the Team Captain will handle all steps.*

- **LOGISTICS CHAIR**: organizes in-office and any community fundraising events.

- **COMMUNICATIONS CHAIR**: in charge of sharing the what, where, when and why of your events, and fundraising progress with office members.

- **ADDITIONAL VOLUNTEERS**: support these or other initiatives as determined.

Find campaign materials on BSPN: [Sell>Marketing>Forget Me Not Days](http://Sell>Marketing>Forget Me Not Days)
Steps to Planning a Forget Me Not Days Event

TEAM CAPTAIN:
1. Assign tasks to team members; those could pertain to recruiting, fundraising, marketing or planning your day-of activities.
2. Set your office fundraising goal.
   • Suggest $1,000.
3. Register your sales office team at Alz.org/FMND.
   • View page 20 for steps on how to register your team.
   • Please name your team: BSO (insert office #), along with your city location. For Example, “BSO 123 Carmel, Ind.”
4. Contact your local Alzheimer’s Association chapter.
   • Contact the chapter within a week of registering.
   • Use the chapter matching chart on BSPN to find a local chapter.
   • View page 12 for tips on working with a chapter.

LOGISTICS CHAIR:
1. Brainstorm collection site opportunities with office planning team.
   We strongly encourage offices to fundraise online. Offices may hold in-person fundraising events if state and local guidelines permit and the Home Office provides advance approval.
   There are two approved ways to supplement fundraising:
   1. Fundraise in your office with events like Jeans Day, a bake sale or collection jar competitions. See page 18 for Jeans Day materials.
   2. Fundraise online to your social network using alz.org/FMND and sharing approved email and social media content (found on BSPN).

Unapproved fundraising:
• Soliciting donations from prospective and/or existing customers.
• Any in-person fundraising that was not first approved by the Home Office. We ask all offices looking to hold an in-person event to submit an application at least one month prior to your proposed event date. Click here to access that form.

COMMUNICATIONS CHAIR:
1. Start fundraising online! (Send emails, post to social media with approved social media content.)
   • Collect online donations from friends and family.
   • Use email and social media templates to boost collections and promote your event to friends and family.
   » Only approved language may be used when sharing your personal fundraising link.
   » Solicitation of prospective and/or existing customers is not permitted.
Steps to Planning a Forget Me Not Days Event

TEAM CAPTAIN:
1. Confirm event details with Logistics and Communications Chairs.

LOGISTICS CHAIR:
1. Confirm details with in-person collection sites.
2. Raise additional funds by incorporating a bake sale or Jeans Days at your office.
   • See page 18 for additional fundraising tips.

COMMUNICATIONS CHAIR:
1. Share plans for the day with friends and family. Invite them to join you!
2. Continue to share your office’s fundraising link.
3. Promote your approved in-person event, post signs and fliers throughout your community.
4. Ensure all participant e-waivers have been completed.

Waivers
Volunteer E-Waiver
Steps to Planning a Forget Me Not Days Event

**TEAM CAPTAIN:**
1. Confirm event details with Logistics and Communications Chairs.

**LOGISTICS CHAIR:**
1. Check e-waivers have been completed by all.

**COMMUNICATIONS CHAIR:**
1. Send emails asking for donations from friends, family or local businesses.
2. Send reminders to your office (schedule, collection location, last-minute fundraising ideas).
3. Promote your approved collection day event on social media with approved social media content.
Steps to Planning a Forget Me Not Days Event

**TEAM CAPTAIN:**
1. Host and provide opening remarks to attendees.

**LOGISTICS CHAIR:**
1. Host and manage volunteers.

**COMMUNICATIONS CHAIR:**
1. Take photos of approved participants using high-definition setting (HDR).
   - Send to ForgetMeNotDays@banklife.com with names of all those photographed. Photos of persons who have not completed a waiver cannot be used.

**TEXT TO DONATE**

Donors can text the word "solstice" to 51555 and receive a link back to donate from their mobile device. They will be prompted to enter the name of the participant they would like to support with a donation.
Steps to Planning a Forget Me Not Days Event

TEAM CAPTAIN:

1. Deposit all donations to your office’s fundraising page via The Longest Day app or deposit check donations with the provided check deposit form.

   - Download The Longest Day app for [iPhone](https://apps.apple.com) or [Android](https://play.google.com) to deposit checks to your office’s fundraising site.
   - Convert cash and coin to a cashier’s check made payable to the Alzheimer’s Association.
   - Send your checks, made payable to the Alzheimer’s Association, to the following address no later than July 16, 2021, with the [2021 Check Deposit Form](#):
     The Longest Day
     PO Box 6804
     Hagerstown, MD 21741-6804
   - View [page 22](#) for more information.

2. Celebrate!

   - Schedule a check presentation or thank-you photo with your chapter as social distancing guidelines permit.
   - [Download a presentation check](#) you can take to any print shop.
   - Organize a recognition event at your office with your volunteers and businesses that donated as social distancing guidelines permit.
   - [Download the volunteer certificate](#).
   - [Download the business certificate](#).
Selecting a Team Captain
Select a member of your office to lead the project, along with others to assist with execution of the project tasks.

Planning tips:
• Book collection locations early.
• Call your Alzheimer’s Association chapter within a week of registering.
• View the Chapter Matching spreadsheet on BSPN. Do a little work each week leading up to the event.
• Recruit donors among office staff and agents.
• Create an event schedule for the day of any approved in-person event.
• Don’t try to tackle too much alone—delegate tasks to others.

Registering your office
• Visit alz.org/FMND to register your office.

Working with the Alzheimer’s Association
The Alzheimer’s Association has a network of over 80 chapters nationwide. Find the chapter closest to your branch using the Chapter Matching spreadsheet on BSPN.

Step 1: Call your local chapter contact as soon as possible to share your event plan.
• Dates and times
• Collection locations
• Volunteers needed to fill shifts

Step 2: Ask for the chapter’s feedback on your plan and, if possible, ask if they can speak to the branch, provide giveaways (bracelets, pamphlets, etc.).

Creating an in-person event schedule
Tips:
• Divide your fundraising day(s) and times to accommodate social restrictions.
• Provide enough aprons, cans and seeds so people are not reusing, along with sanitizer to wipe down tables and supplies periodically and between shifts.
**Participant waivers**

https://waiver.smartwaiver.com/w/5ffe1b876e211/web/

Every volunteer MUST sign and return a waiver BEFORE participating in Forget Me Not Days. **NO EXCEPTIONS!**

Every participant must sign up on your office’s online fundraising page on [Alz.org/FMND](https://waiver.smartwaiver.com/w/5ffe1b876e211/web/).

**Seed packets**

- Seeds are complimentary, but quantities are limited. Teams registered by March 20 will be sent one box (1,000) seeds.
- **Click here to order additional seeds.** Seeds will be available in late March.

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**EVENT TIP**

**Friendly competition can be fun!** Many offices divide volunteers into teams and reward winners with a Jeans Week/Day or pizza party.
Donation submission guidelines

Submit donations by app or mail.

• Download The Longest Day app for iPhone or Android and scan checks for automatic deposit to your branch’s fundraising page.

Or, mail checks to:

The Longest Day
PO Box 6804
Hagerstown, MD 21741-6804

Notes:

1. Do not use FedEx or UPS. They do not deliver to PO boxes.
2. Mailed checks take two weeks to process and appear on your page. Make sure to mail in checks by July 16, 2021 to meet the July 31 deadline.

Tips:

• All cash and coin collections must be converted into a cashier’s check made payable to the Alzheimer’s Association.
• Write a memo on the front of the check stating:
  » Your BSO #
  » Your contact information
  » 2021 Bankers Life Forget Me Not Days
• Collections may NOT for any reason be deposited in a personal or business bank account. Converting collections to a cashier’s check does NOT require the funds to be deposited in a bank account.
• If you encounter a cashier’s check fee, be sure to mention it’s for charity and ask them to waive the fee. If they are unable to waive, you may take the amount of the fee out of the collection total.
• Failure to submit your check by July 16, 2021, will make you ineligible for the territory contest and any prizes UNLESS you make other arrangements that have been approved by the Home Office.
• If you have a fundraiser that falls after June 30, 2021, contact Elizabeth Kinder at ForgetMeNotDays@banklife.com.

Please note

Anything that can’t be converted into a cashier’s check will not be included in your office’s collection total. This includes, but is not limited to:

• Value of donated food
• Value of donated merchandise (TVs, trips, gift cards, services, etc.)
• Cash or check donations that have been promised, but not received by July 31, 2021
• Funds raised at an unapproved in-person event (funds will be sent to the Alzheimer’s Association and included in the overall campaign total)

Qualified Fundraising Incentives Program

Branch Office Fundraising

Top fundraising office honored with Bankers Life Community Champion Award trophy.
Top ten fundraising offices will receive a 16x23 framed 2021 campaign poster.
Top territory (highest percentage of office participation) honored with traveling plaque housed in territory office.
Offices that raise $1,000+ will receive a 12x18 framed 2021 campaign poster.
Funds must be received by Saturday, July 31 for award consideration.

Individual Fundraising

Raise $100+ online to receive a certificate signed by Scott Goldberg.
Raise $250+ to be eligible for prizes issued by the Alzheimer’s Association.
Fundraising deadline, end of day July 31.
Fundraising Ideas

In addition to setting up your collection locations, here are some other ways to help increase collections.

Ask local businesses

Click here to access the pre-approved letter to ask local businesses to support Bankers Life FMND.

Don’t forget, some stores have matching grant programs through which they’ll double any collections you raise in front of their stores.

Ask restaurants, dry cleaners, convenience stores, etc., to place a collection canister at their register.

IMPORTANT: Prospective and existing policyholders may NOT be solicited for Bankers Life FMND donations.

Ask friends and family

Share the vision for a world without Alzheimer's with your personal network!

• Raise $200 in one week!
  » Day 1: Make your own $25 donation.
  » Day 2: Ask two relatives to donate $20.
  » Day 3: Ask three friends to donate $15.
  » Day 4: Ask four co-workers to donate $10.
  » Day 5: Ask five neighbors to donate $5.
  » Day 6: Ask your spouse or partner to donate $25.
  » Day 7: Celebrate—you just raised $200!

• Host a Jeans Day
  » Organize a Jeans Day in your branch.
  » Participants pay to wear jeans to work (you can set the price, such as $1, $5 or $10).
  » Use the posters and jeans passes to create your event:
    - Posters: Click here to access, download and print the poster on your color printer. Then, customize with your event’s date, price and contacts.
    - Jeans passes: Click here to access, download and print passes. Two different color passes (blue and green) give you the option to host more than one Jeans Day or charge different prices.

For example:
  » Blue pass is for Monday’s Jeans Day and the green pass is for Friday’s Jeans Day.
  » Blue pass is for $3 one-day Jeans Day pass and the green pass is for the $5 two-day Jeans Day pass.
Fundraising Ideas

Holding an in-person fundraiser

In limited circumstances, offices may submit a proposal for an in-person public fundraiser. Charity fundraisers outside of the approved Bankers Life FMND format raise a number of tax, contract and liability issues that must be addressed prior to the event in order to protect the office, office leadership and the company.

Important: Only approved public fundraisers can be organized given 1) state and local public safety guideline in light of COVID-19 and 2) use of Bankers Life using the Bankers Life FMND and Alzheimer’s Association names and logos. In-office, non-public fundraisers, such as office bake sales, Jeans Days, etc., don’t need Home Office approval.

State and local health and social restriction guidelines factor in to event consideration, and guidance can quickly change. Every in-person public event request will be reviewed and considered on a case by case basis.

Application steps

1. Seek the approval of your office leadership.
2. Seek approval from your local Alzheimer’s Association chapter contact.
3. Receive Home Office approval:
   » Submit the Application form to Elizabeth Kinder at least 1 month prior to the event date.
   » The venue’s Certificate of Liability must be included with the application.
   » The venue’s insurance must meet CNO’s minimum standards, which are described in the application.

Download

Download all materials from BSPN
Sell > Marketing > Forget Me Not Days > Planning Kits

Tips

Forms must be submitted at least 1 month prior to the event date. Return the application to Elizabeth Kinder, ForgetMeNotDays @banklife.com.

All special event fundraisers must be reviewed annually.

Ready to join the fight against Alzheimer’s disease? Follow the instructions below to register for the Alzheimer’s Association The Longest Day® and set up your fundraising web page. If you have any registration questions, please email tld@alz.org.

1. Register to get started.
   - Visit alz.org/fmnd
   - Click “Register To Get Started” or “Get Started” or “Find Team or Participant”

2. Sign in.
   - If you’re a returning participant, click “Yes.” Log in with your username and password. Your information from previous years will be accessible, including your email contacts.
   - If you’re new, click “No” and continue to the registration page.

3. If you are joining a team . . .
   Search by participant or fundraiser name or by city and state.

4. If you are starting a team . . .
   - Name your Team/Event and set an overall fundraising goal.

5. Set your personal fundraising goal and make an additional donation if you choose to do so.

6. Complete your registration.

Once your registration is complete, you will receive a confirmation.
Check out your dashboard.
Closing the confirmation screen will take you directly to your Participant Center dashboard. In this section you can:
• Check out your personal and team fundraising progress and edit your goals.
• If you are the Team Captain, click on “Activate Your Team” to get the Team Captain tools.
• Tools to help you reach your goal.

Set up your participant page.
Closing the confirmation screen will take you directly to your Participant Center dashboard. From there, click “My Page.”
In this section you can:
• Create a shortcut link to your page by clicking “Customize Your Link.”
• Share your page and connect your page to Facebook.
• Customize your page by uploading a photo or YouTube video.
• Add your story—the reason why you participate.
• Edit your team’s page under the “My Team’s Page” tab (Team Captains only). Be sure to click “Save.”

Send email.
Click “Send Email” and decide your delivery method.
Through your personal account:
• Select one of the email templates provided in the Participant Center.
• Copy the message and paste it into a new email in your personal account.
• Edit the message to make it your own and include as a link to your personal page.

Or send through your Participant Center.

Get social.
In this section you can:
• Create a Facebook Fundraiser by clicking “Connect to Facebook!” All of your donations through Facebook will be in your progress tab if you connect it through your participant center. This was one of the best fundraising tools in 2018.
• Check out the Social Media Guide.
• Download The Longest Day app to text friends and family and to deposit check donations immediately. How cool is that!!
• Not on Facebook? Use the Social Fundraising tools to schedule Tweets and LinkedIn posts.
CHECK DEPOSIT FORM
Bankers Life Forget Me Not Days®

NEW: Download The Longest Day app for iPhone or Android and scan checks for automatic deposit to your personal or team fundraising page
Or, mail checks to:
The Longest Day
PO Box 6804
Hagerstown, MD 21741 - 6804
(Note: Please only use USPS and not UPS or FedEx, as they do not deliver to post office boxes)

Use this form to track and deposit donations made by check. Include your personal information to ensure that the donation is credited to your fundraising total, and include all donor information so they can receive a tax-exempt receipt. Checks should be made out to the Alzheimer’s Association and will be posted to your fundraising total within two weeks of postmark date. Please print legibly and do not abbreviate to ensure your funds are properly credited.

Participant Information

First Name ___________________________ Last Name ___________________________

Team Name (if applicable): ___________________________________________________

Company/Group (if applicable): Bankers Life Forget Me Not Days®

Post funds to (choose one): ☐ My personal fundraising page ☐ My team’s fundraising page

Email Address: ___________________________________________ Phone Number: ___________

Street Address: ____________________________________________

City: ___________________ State/Country: ___________________ ZIP: ___________

BSO Office # ___________________

Donation Information: Receipts will be emailed the same day as processing or mailed within 30 days if the donation is over $25.

1. Donor Name ___________________________ Gift Amount: __________ Check #: ___________

   Donor Street Address: _____________________________________________

   City/State/ZIP: ___________________________ Email: ___________________________

2. Donor Name ___________________________ Gift Amount: __________ Check #: ___________

   Donor Street Address: _____________________________________________

   City/State/ZIP: ___________________________ Email: ___________________________

3. Donor Name ___________________________ Gift Amount: __________ Check #: ___________

   Donor Street Address: _____________________________________________

   City/State/ZIP: ___________________________ Email: ___________________________
4. Donor Name ____________________ Gift Amount: __________ Check #: _________________
   Donor Street Address: ____________________________________________________________
   City/State/ZIP: ___________________________ Email: ________________________________

5. Donor Name ____________________ Gift Amount: __________ Check #: _________________
   Donor Street Address: ____________________________________________________________
   City/State/ZIP: ___________________________ Email: ________________________________

6. Donor Name ____________________ Gift Amount: __________ Check #: _________________
   Donor Street Address: ____________________________________________________________
   City/State/ZIP: ___________________________ Email: ________________________________

7. Donor Name ____________________ Gift Amount: __________ Check #: _________________
   Donor Street Address: ____________________________________________________________
   City/State/ZIP: ___________________________ Email: ________________________________

8. Donor Name ____________________ Gift Amount: __________ Check #: _________________
   Donor Street Address: ____________________________________________________________
   City/State/ZIP: ___________________________ Email: ________________________________

9. Donor Name ____________________ Gift Amount: __________ Check #: _________________
   Donor Street Address: ____________________________________________________________
   City/State/ZIP: ___________________________ Email: ________________________________

10. Donor Name ____________________ Gift Amount: __________ Check #: _________________
    Donor Street Address: ____________________________________________________________
    City/State/ZIP: ___________________________ Email: ________________________________

Total number of checks included: ______________
Total dollar amount included: ______________
alzheimer's association

gratefully acknowledges a gift in connection with

Bankers Life
Forget Me Not Days
Plant a seed of hope.

GIFT AMOUNT $

________________________________________

DATE

________________________________________

DONATED BY

________________________________________

________________________________________

No goods or services were exchanged for this donation.

The Alzheimer's Association®, a 501(c)(3) non-profit, charitable, tax-exempt organization, is the leading voluntary health organization in Alzheimer's care, support and research.

Federal Tax ID: 13-3039601