

## ***2014 Cambridge Matching Gifts Program***

### **Who Can Give**

Permanent, full-time associates of Cambridge Investment Research, Inc. and Cambridge rep-advisors

### **How the Cambridge *Matching Gifts* Program Works**

Dollar for dollar, Cambridge will match up to \$50 per calendar year in contributions made to eligible charitable organizations, per associate/rep-advisor. Cambridge will match gifts of cash, personal checks, and credit cards. Eligible associates and rep-advisors must make personal contributions of \$25 or more. The contribution must be paid, not pledged, and gifts must have been made within the current calendar year to qualify for a matching gift. Matching gifts are made on a first-come, first-serve basis until the annual corporate giving budget is depleted. The deadline for completing the *Matching Gifts* Form is December 31 of each year.

### **Purpose**

The Cambridge *Matching Gifts* Program is designed to maximize the positive impacts generated by community service. The primary objective is to demonstrate Cambridge's commitment to our core values of integrity, commitment, flexibility, and kindness. We seek to enhance impact and engage associates and rep-advisors in our company-wide passion for giving.

### **Eligible Organizations**

In order to qualify for the Cambridge *Matching Gifts* Program, charitable organizations are required to demonstrate Department of Treasury 501(c)(3) public charity status. Cambridge does not match gifts to private foundations, charitable gift funds (donor advised funds), political or religious organizations, or organizations with a formal mission in conflict with Cambridge's core values. Cambridge will consider matching gifts to religious organizations when the gift is designated to an ongoing secular community service program that does not propagate a belief in that specific faith. These programs must have a formal mission and separate program budget. In addition, the benefits of the gift must not be limited exclusively to the organization's members. Examples of these projects include: homelessness projects, food banks, shelters, and literacy programs.

Educational institutions, including private and public degree-granting colleges and universities, two-year colleges, graduate and professional schools, technical and specialized schools, seminaries and theological schools, and publicly and privately supported primary and secondary schools are eligible. Cambridge will also match gifts to tax-exempt alumni funds, foundations, and associations whose exclusive purpose is the support of these educational institutions. Parent Teacher Organizations (PTO) which are recognized by the IRS as tax-exempt under section 501(c)(3) are also eligible. Please note that only charitable deductions to these institutions are eligible for matching gifts. Tuition payments cannot be paid directly or indirectly through this program. The Cambridge *Matching Gifts* Program will verify with the institution that your donation was not for tuition purposes.

*Although Cambridge expects to continue its Matching Gifts Program, the company reserves the right to amend, modify, or terminate the Cambridge Matching Gifts Program at any time without notice and to determine whether any gift qualifies as matching. Funding is limited and subject to change. Requests are considered on a first-come, first-serve basis in a calendar year.*

**Requesting a *Matching Gifts* Donation**

Complete Part A of the form and mail it, along with your gift, to a qualified organization. The organization will complete Part B and return the entire form to the Cambridge *Matching Gifts* Program.

**Please note: All Matching Gift forms must reach Cambridge by December 31, 2014 in order to be applied to your 2014 limit.**

***Part A: Cambridge Associates and Rep-advisors***

Complete Part A of the form and mail it, along with your gift, to a qualified organization.

Organization name: \_\_\_\_\_

Mailing address: \_\_\_\_\_

Type of organization (*please check one*):

Arts/Cultural/Community       Education       Health and human services       Other \_\_\_\_\_

Amount of gift: \$\_\_\_\_\_      Date of gift: \_\_\_\_\_      Made by:  Cash     Check     Credit card

Please match my gift with this amount: \$\_\_\_\_\_ (less than or equal to gift - no more than \$50)

Donor name: \_\_\_\_\_

Donor email: \_\_\_\_\_

Signature: \_\_\_\_\_

**Part B: Charitable Organization/Institution**

Cambridge must receive the *Matching Gifts* Form from your organization by December 31, 2014, in order for this match to be applied to the associate's matching limit for the current calendar year. The gift must have been made within the current calendar year in order to qualify for a matching gift.

Eligible charitable organizations require Department of Treasury 501(c)(3) public charity status. Cambridge does not contribute to religious or political organizations.

***Please type or print.***

I certify that the gift in the amount of \$ \_\_\_\_\_ was received on \_\_\_\_\_ (*insert date*) and that this organization is an eligible recipient as specified on this form.

Name of officer: \_\_\_\_\_

Title of officer: \_\_\_\_\_

Organization: \_\_\_\_\_

Organization employer ID number: \_\_\_\_\_

Mailing address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email address: \_\_\_\_\_

Signature: \_\_\_\_\_

If this is the first time you are requesting a matching gift from Cambridge, please enclose a copy of your Department of Treasury 501(c)(3) tax-exempt document and mail the form to:

**Cambridge Investment Research, Inc.**  
**Cambridge Matching Gifts Program**  
**1776 Pleasant Plain Road**  
**Fairfield, Iowa 52556**  
**Attn: Aaron Potter or Cindy Schaus**

If you have any questions, please contact Aaron Potter ([aaron.potter@cir2.com](mailto:aaron.potter@cir2.com)) at 641-472-5100.