

ABERDEEN ASSET MANAGEMENT INC.
MATCHING GIFTS PROGRAM

The Aberdeen Asset Management Inc. Matching Gifts Program is designed to provide employees across the organization with the opportunity to make financial contributions to a broad range of eligible nonprofit organizations dedicated to strengthening the communities in which we live and work. These include affordable housing initiatives, education health and human services, civic and community improvement projects, and cultural enrichment programs.

How the Program Operates

Aberdeen will provide a dollar-for-dollar match of any contributions you make to eligible nonprofit organizations, up to \$500 per employee annually. The minimum contribution to any eligible organization that will qualify for matching is \$50. Within these limits, this program will effectively enable you to double the benefit of your contributions to the organizations of your choice.

What Contributions are Eligible?

- Must be a personal gift, from the employee's personal funds, which has been paid and not simply pledged. The minimum gifts eligible for matching is US\$50.
- The nonprofit organization must be recognized by the US Internal Revenue Service as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS code or an instrumentality of a federal, state, or local government as provided by Section 170(c)(1) of the IRS Code.
- Gifts must be in the form of cash, check, or credit card. No other form of personal or real property will be matched.
- Donations to churches, synagogues, etc. will be accepted as long as they are made for a specific human service related purpose; i.e., education, child care center, food banks, homeless shelter, etc. Matching requests for religious organizations must include a receipt of acknowledgment letter that clearly states a specific human service was performed in conjunction with the contribution.
- Aberdeen reserves the right to further restrict gifts based on the availability of funds.
- Aberdeen reserves the right to refuse to make a matching request at its discretion.

What contributions are not eligible?

- Gifts to political parties, political action committees (PACs), or other political organizations
- Gifts to colleges and universities (public or private)
- Donations to athletic scholarships, funds, foundations or facilities, or Alumni(ae) dues or dues for similar groups
- Tuition payments, contributions made in lieu of tuition or fees, tickets, dues, meals, parking or other benefit
- Gifts to Parent Teacher Associations (PTA), Parent Teacher Student Associations (PTSA), Parent Teacher Organizations (PTO), Parent Advisory Councils, booster club or similar organizations
- Gifts intended to fulfill the tithe or any church-related financial commitment

- Bequests; life income trust arrangements; any gifts that restrict the immediate use of funds by the nonprofit organization
- Insurance premiums
- Membership dues for which benefits are received
- Technical or professional associations
- Those which pose a legal conflict-of-interest for either the corporation or the applicant employee

Eligible Employees

All regular full-time and part-time employees of Aberdeen working at least 30 hours per week are eligible for participation.

Application Process

To make a request for a matching contribution from Aberdeen, complete the Matching Gifts Request Form.

Please attach:

- a scanned copy of the cancelled check, on-line donation receipt, credit card receipt or statement of acknowledgment from the organization;
- evidence of 501(c)3 status or registered charity status
- tax identification number

Email Completed Form to: "US Finance" mailbox

Deadline

**Matching Gifts requests must be submitted within the same fiscal year in which the donation was made. All requests submitted after September 30 will be considered and, if approved, deducted from the current years' allocation. (i.e., a donation is made to a qualifying nonprofit organization in August but not submitted until October. If approved, the donation will be deducted from the \$500 available during the current fiscal year not the previous fiscal year in which the donation was made.)

You will receive a Statement of Acknowledgement from US Finance informing you that your contribution has been matched by Aberdeen.

