



# Aera Energy Matching Gifts Program

Each calendar year Aera Energy LLC will match up to \$1,000 per year in donations by eligible employees to qualifying schools and educational institutions. Aera Energy will grant a 2:1 match, which will be applied to gifts that support the primary educational mission of the institution.

## Eligible Participants

All regular and limited benefit employees of Aera Energy Services Company (full time and part time) are eligible for the Aera Energy Matching Gifts Program. Individuals classified as independent contractors, leased employees and employees hired for temporary periods under special programs - such as summer interns - are ineligible for the program.

## Eligible Organizations

Public and private K-12 schools and higher education institutions are eligible. These include primary and secondary schools; two-year and four-year colleges and universities; graduate and professional schools; and technical institutes.

In addition, the American Indian College Fund, the Hispanic Association of Colleges and Universities, and the United Negro College Fund are eligible for the program. No other funds or federations are eligible.

The school or institution must be located in the United States or one of its possessions and accredited by a nationally recognized accrediting body. It must be recognized by the Internal Revenue Service as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS Code or as an instrumentality of a federal, state or local government as provided by Section 170(c)(1) of the Code.

## Eligible Gifts

- The donation or gift must support the primary educational mission of the school or institution
- It must be a tax deductible donation from an employee's personal funds that has been paid - and not simply pledged - to an approved organization.
- The gift must be made directly to the school, college, or university. The donation should be made to the parent institution, not to a sub-unit of the institution. However, the donor may designate a specific purpose for which the gift is to be used. The company match will go to the specific purpose designated by the donor, which may include a particular sub-unit such as a department, academic program, or scholarship fund.
- A donation may be made to the general-purpose foundation established by some institutions, but a donation may not be made to any other separately incorporated group or organization acting as a conduit of funds to the institution.
- The minimum gift eligible for matching is \$50.
- The maximum amount matched per donor per calendar year is \$1000. If an employee makes several contributions, gifts will be matched in the order received, up to the maximum annual donor limit for the calendar year.
- The donor's limit is based on the date of the gift.
- Gifts may be in the form of check, credit card, or marketable securities with a quoted market value.
- Donors may be asked to provide proof of a contribution in the form of a cancelled check, bank statement, credit card statement, or a transfer of stock certificate.
- Gifts of securities are valued based on the average of the high and low on the date of the gift. No other form of personal or real property will be matched.

## Ineligible Gifts

The following gifts are not eligible for a company match:

- Gifts made by or through Community Trusts or similar organizations, including Charitable Remainder Trusts, Donor Advised Funds, or Family Foundations
- Payments for which the donor, a family member, or other individuals designated by the donor receive a direct benefit. Examples include payments for services, tuition, books, or other student fees; gifts to fulfill pledges, tithes, or other religious-related financial commitments or legal obligations; publication subscription fees; membership dues; ticket purchases; insurance premiums; bequests
- Gifts to ineligible organizations. Examples include gifts to alumni associations; athletic associations; booster clubs, parent-teacher associations or organizations; contributions to individuals, fraternities or sororities; gifts given to or through a third party.
- Gifts for non scholastic purposes, i.e. dinners, events, athletics, athletic scholarships, marching band, stadium construction or maintenance.
- Gifts for trips, i.e. senior trips, band trips, attendance at conferences.
- Gifts in the form of premiums on insurance under which the institution is the beneficiary.
- Gifts of real or personal property
- Cumulative gifts from several individuals reported as one contribution

## How Does the Program Work?

Employees may request matching gifts online at <http://www.easymatch.com/aeraenergy> or by submitting this paper form, which is processed as follows:

### Employee Instructions

The employee completes Part 1 of the form and mails the completed form and any other necessary documentation to the recipient organization.

### Organization Instructions

The recipient organization completes Part 2 of the form and mails the completed form to the Aera Energy Matching Gifts Program at P.O. Box 2157, Princeton, NJ 08543-2157.

### Processing Timetable

Eligible requests are processed quarterly. Matching gifts are distributed once each quarter when received by the following cut-off dates:

<b>Received By:</b>	<b>3/31</b>	<b>6/30</b>	<b>9/30</b>	<b>12/31</b>
<b>Distributed By:</b>	<b>4/30</b>	<b>7/31</b>	<b>10/31</b>	<b>1/31</b>

Matching Gifts must be requested within six months of the gift date. Requests received after that time will not be honored. Receipt of the gift will be verified by the organization.

For more information, please visit the program web site at <http://www.easymatch.com/areaenergy>.

For questions, please contact the Aera Energy Matching Gifts Program via email at [aeraenergy@easymatch.com](mailto:aeraenergy@easymatch.com) or phone at 1-866-632-1409.

## Administrative Conditions

Aera Energy LLC may suspend, amend, or discontinue the Matching Gifts Program at any time and reserves the right to determine whether any gift shall be matched.



# Aera Energy Matching Gifts Program

## Part 1 – Donor Section

**Instructions:** Complete Part 1 of this form – one for each gift. *Please print or type.* Send the form and a copy of the program guidelines with your contribution to the recipient organization.

### Donor Information

DONOR USER ID

DONOR NAME

HOME ADDRESS

CITY/STATE/ZIP

BUSINESS TELEPHONE, INCLUDING AREA CODE

E-MAIL ADDRESS

EXACT DATE OF GIFT

\$  
AMOUNT OF GIFT (MIN \$50)

\$  
AMOUNT TO BE MATCHED (MAX \$1000)

#### TYPE OF GIFT: PLEASE CHECK ONE:

CHECK/CREDIT CARD     SECURITIES

IF SECURITIES, NUMBER OF SHARES AND NAME OF SECURITY

### Recipient Organization Information

NAME OF ORGANIZATION

ORGANIZATION CITY, STATE

RESTRICTION OR PURPOSE (IF ANY)

I hereby certify that:

- Neither my family nor I will derive any direct or indirect financial or material benefit from this contribution.
- I authorize the above-named recipient organization to report this gift to Aera Energy for the purpose of applying for a matching gift.
- My gift is a voluntary contribution, that it fully complies with the provisions of the program described herein, and does not represent in anyway a fee for a service or benefit.
- Any misrepresentation by me of the statements made herein will forfeit my rights to any matching contributions and, in addition, may result in violations of law.
- I have not been nor will be reimbursed by anyone for this contribution.
- I have read and understood the guidelines of the Aera Energy Matching Gifts Program.

SIGNATURE OF EMPLOYEE

DATE

*\*Failure to complete this form will delay processing.*

## Part 2 – Recipient Organization Section

**Instructions:** Verify receipt of the gift. Complete Part 2 of this form. *Please print or type.* If this is your first matching gift request to the Aera Energy Matching Gifts Program, please enclose a copy of your Internal Revenue Service 501(c)(3) IRS determination letter and a brief description of your organization's primary mission statement or purpose. Forward the form to the address printed below.

EMPLOYER IDENTIFICATION NUMBER (EIN)

ORGANIZATION NAME

ADDRESS

CITY/STATE/ZIP

TELEPHONE, INCLUDING AREA CODE

FAX, INCLUDING AREA CODE

E-MAIL

WEBSITE ADDRESSES (IF ANY)

DATE GIFT RECEIVED

\$  
AMOUNT OF GIFT

\$  
TAX DEDUCTIBLE GIFT AMOUNT

I hereby certify that:

This organization/program meets the eligibility requirements of the Aera Energy Matching Gifts Program and that

- neither the donor nor Aera Energy will derive any personal material benefit from this gift or match.
- this organization is in full compliance with the anti-terrorism laws legislated by the USA Patriot Act. In addition, by countersigning this Matching Gift Application, I agree that this organization will not promote or engage in violence, terrorism, bigotry or the destruction of any state, nor will it make sub-grants to any entity that engages in these activities.
- I am authorized to attest to the above statements and have sufficient knowledge to do so.
- I have read and understood the guidelines of the Aera Energy Matching Gifts Program.

AUTHORIZED OFFICER'S NAME (PLEASE PRINT)

TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZED OFFICER

DATE

*\*Completed forms must be received within six (6) months of the date of gift. Failure to complete this form will delay processing.*

#### MAIL COMPLETED FORM AND REQUIRED ENCLOSURES TO:

Aera Energy Matching Gifts Program  
P.O. Box 2157

Princeton, NJ 08543-2157

**Phone:** 1-866-632-1409

**E-mail:** [aeraenergy@easymatch.com](mailto:aeraenergy@easymatch.com)

**Web Site:** [www.easymatch.com/aeraenergy](http://www.easymatch.com/aeraenergy)