A&B FOUNDATION

# APPLICATION FOR MATCHING GIFTS

PLEASE PRINT OR TYPE

## APPLICATION PROCEDURE

**Step 1.** Donor (director, eligible employee or retiree) obtains a Matching Gifts application from the Human Resource Department, completes the donor portion of the form (Step 1) and forwards it with his or her gift to the Recipient Institution.

**Step 2.** Within 45 days of the date of the gift, the Recipient Institution completes its portion of the form (Step 2), verifying that it meets the recipient eligibility requirements. The form is forwarded to the A&B Human Resource Department (address below).

**Step 3.** The A&B Human Resource Department verifies the Donor's eligibility (Step 3). The form is forwarded to the A&B Foundation where the Recipient Institution's eligibility is verified. Then a matching gift check will be sent to the Recipient Institution. The Donor will be notified in writing of the matching gift payment.

Requests for information relating to the A&B Foundation Matching Gifts Program should be addressed to:

Alexander & Baldwin Foundation
Matching Gifts Program
P.O. Box 3440
Honolulu, HI 96801-3440

## STEP 1

**DONOR SECTION:** Please complete all of Step 1 and mail entire page to Recipient Institution.

**A. Donor Information** I am an eligible ❑ DIRECTOR ❑ EMPLOYEE ❑ RETIREE (check one) of:

Company, Subsidiary, Division

Print or Type Full Name

Department/Location

Home Address

Date of Employment

Date of Retirement (if retiree)

City, State, Zip Code

Daytime Phone Number

**B. Donor's Gift**

I am pleased to enclose my personal gift of $_____ or _____ shares of _____ stock which have a closing market or trading value as of this date of $_____.

**C. Gift Made To** ❑ CULTURAL ❑ EDUCATIONAL (check one) **Institution**

Name of Institution

Date of Gift

Address

City, State, Zip Code

This institution is authorized to report this gift to the Alexander & Baldwin Foundation for the purpose of qualifying for a matching gift in accordance with the Matching Gifts program, by providing certification and forwarding the completed form to Alexander & Baldwin, Inc. Human Resource Dept., P.O. Box 3440, Honolulu, Hawaii 96801-3440.

Donor's Signature

## STEP 2

**RECIPIENT SECTION:** Please complete and mail entire page to
**Alexander & Baldwin, Inc. Human Resource Dept., P.O. Box 3440, Honolulu, Hawaii 96801-3440.**

### A. VERIFICATION OF DONOR GIFT

This is to certify that the above described gift of $ _____ was received on _____ .
Date

### B. RECIPIENT ELIGIBILITY AND CONTACT INFORMATION

We have reviewed the eligibility requirements of the Alexander & Baldwin Foundation Matching Gifts program described on this form (below) and certify that our institution meets these requirements.

| | |
|---|---|
| Name of Organization | IRS Number |
| Address | City, State, Zip Code |
| Name and Title of Certifying Officer (print/type) | Telephone / Fax |
| Signature / Date | Email / Website |

**RECIPIENT ELIGIBILITY**
Please review the following to ensure your institution is eligible. Final determination of any institution's initial and continuing eligibility and participation will be made by the A&B Foundation.

**Educational** — Eligible recipients include pre-schools; elementary and secondary schools; collegiate-level, professional or technical schools; two-year, junior, community and four-year colleges and universities and graduate schools. Such institutions must be located within the United States, be tax-exempt, non-profit, non-proprietary and be accredited or approved by a nationally recognized accrediting agency, a state department of education, a state university or operated under public control.

**Cultural** — Recognized cultural organizations and institutions open to and operated for the benefit of the general public, such as museums and centers of art, science and history; public libraries; botanical and zoological societies; public radio and television stations; community or professional performing arts organizations (including symphony orchestras, opera, ballet dance, theaters and choral groups) are eligible to receive matching gifts if they are tax-exempt, non-profit organizations recognized by the Internal Revenue Service as institutions to which contributions are deductible for income tax purposes.

Such institutions must be located in the United States or one of its possessions, and must be administered by a trained professional manager. Both tax-supported and privately-endowed institutions are eligible, as are foundations of associations which have tax-exempt status and which give all contributions received by them to eligible institutions outlined above, or which use funds entirely for the benefit of such institutions. Memberships considered to be contributions also qualify.

**CONSTRAINTS**
No matching gifts will be given for tuition payments; fees for services; unpaid pledges; bequests; contributions to trusts; insurance premium payments; dues to alumni or other groups; subscription fees for publications; tickets for cultural or sports events; gifts of real or personal property; donations of time, talent or equipment; or donations to religious or political organizations. However, gifts to schools operated by religious organizations will be matched provided their primary purpose is educational.

The A&B Foundation will not match gifts to any organization which discriminates in any way that is inconsistent with its equal opportunity policies.

**FORM OF GIFT**
Gifts must be personal contributions made, not merely pledged, in cash or securities. Only securities with easily definable market values and which are immediately negotiable will be eligible. The closing market or trading price on the date of the gift will determine its value.

**DESIGNATION OR RESTRICTION OF GIFT**
Donors may make unrestricted gifts, or they may designate their gifts for specific projects. The A&B Foundation's matching funds will be unrestricted.

## STEP 3

### EMPLOYMENT INFORMATION VERIFIED:

Human Resource Department Signature _____ Date _____