## **MATCHING GIFT REQUEST**





## DONORS AND RECIPIENTS: To avoid delays in processing your request, PLEASE NOTE -

- Fill in your section completely. Do not leave any field empty.
- The Foundation will only process Matching Gift Requests with all the fields completed.
- Incomplete Matching Gift Request forms will be returned to the Donor or Organization.
- Sorry, no exceptions will be made!

### Donor:

- · Complete Part 1 of this form. Submit one form for each gift.
  - By computer: Use the tab key and fill in each field.
  - By hand: Type or print in ink.
- Print form and sign it. Only forms with original signatures will be processed.
- Send the original form with your contribution to the recipient organization.

# **PART 1 - DONOR SECTION** DONOR INFORMATION: Donor Name Employee No. (if any) Company Business Unit Daytime Phone No. E-mail Address (if any) Home Address Citv Zip Donor Type (check one) ☐ Employee ☐ Retiree Corporate Board **RECIPIENT INFORMATION:** Name of Organization / Institution City State Specific Designation ☐ Charitable Gift (see "Eligible Contributions" on Page 2 to ensure your gift qualifies for matching funds.) Amount of Gift \*Amount of Match Requested (Minimum = \$25)\$ \*Gifts to college and university athletic departments are matched at 80%. The value of any gift or benefit to you should be deducted. ☐ My gift represents the transfer of securities. I have enclosed the documentation as required on Page 2 of this form. I certify that my gift is a voluntary contribution derived from my own resources, and not a pledge or payment for tuition, services or other financial obligations. I further certify these are my own resources, not the collected gifts or a loan from any other person or organization; and this is a single gift, not an aggregation of contributions. My gift complies in all aspects with the provisions listed on the reverse of this form, and I do not expect any tangible benefit to be given to me or any person or organization named by me. Donor Signature Date

## Recipient Organization:

- Complete Part 2 of this form Type or print in ink.
- Verify amount of gift. See Page 2 for additional information.
- Enclose your 501(c)(3) letter, proof of accreditation or qualification as a charitable organization under a governmental entity. Copies of tax returns and Certificates of Exemption are not acceptable.
- Forward the **original form** to the address printed below.

PART 2 - RECIPIENT SECTION			
Organization Name as listed on 501(c)(3)			
Employer Identification No. (EIN)			
Address			
City		State	Zip
Phone No. (including area code)	Fax No. (	including Area	Code)
( )	( )		
E-mail Address (if any)	Website Address (if any)		
Amount of Gift	Date Gift Received		
Amount to be Matched (to be filled in by recipient)			
*Gifts to college and university athletic departments are matched at 80%. The value of any gift or benefit to donor must be deducted.			
☐ I have enclosed a copy of the required IRS 501(c)(3) letter or other appropriate documentation.			
I certify the above gift has been received and the amount of the gift to be matched represents a charitable contribution from which the donor derives no material benefit (e.g., tuition, tickets, subscriptions, etc.) as a result of this gift and that it will used to support the objectives of this organization.			
Authorized Officer's Name (please print)			
Signature of Authorized Officer	Title (ple	ease print)	
MAIL COMPLETED, ORIGINAL FORM AND REQUIRED ENCLOSURES TO:			
Alliant Energy Foundation Matching Gifts Program c/o The JK Group P.O. Box 2325 Princeton, NJ 08543-2325			
FOR QUESTIONS REGARDING THE ADMINISTRATION OF THE PRO- GRAM OR YOUR SPECIFIC GIVING HISTORY, please contact The JK Group:			
Phone: 1-866-746-7902 E-mail: alliantenergy@easymatch.com			
FOR INTERPRETATION OF THE PROGRAM, please contact Bonnie Beach, Alliant Energy Foundation:			
Phone: 608-458-GIVE (4483) or 1-800-255-4268, Ext. 458-4483 E-mail: foundation@alliantenergy.com			

#### **HOW IT WORKS**

At the same time that you make a contribution to an eligible organization, complete the Matching Gift form available in the Forms Catalog on the Compass (Form 75-1890) or from the Foundation staff, and mail it directly to the organization. The match can be made only after your documentation is received from your organization and processed by the Foundation staff. Each gift of \$25.00 or more will be matched dollar-for-dollar. The maximum amount per qualifying donor per calendar year is \$10,000.00. If the Matching Gift form is received in the Foundation office before December 1 of any given year, it will be applied to your total for that calendar year.

#### **HOW TO PARTICIPATE**

Fill out, sign and submit an Alliant Energy Foundation Matching Gifts form with your gift to the eligible organization (see Part 1 on Page 1). An authorized representative of the organization should then complete and sign its portion of the form and send it to the Alliant Energy Matching Gifts Program at the address on the form along with the requested documentation (see Part 2 on Page 1). Only original forms (with original signatures) will be accepted and processed. Incomplete or illegible forms will be returned to the Donor or Organization.

#### TRANSFER OF SECURITIES

If your donation represents the transfer of securities, your form must be accompanied with a copy of the transaction notice from your stockbroker (which must clearly reference your name, date and number of shares transferred, and the value of your shares on the day they were transferred). If signing over a stock certificate directly to a non-profit institution (no broker involved), please provide a copy of the authorization letter and/or stock assignment and/or a copy of the front and back of the signed stock certificate, along with the value of your shares on the day they were transferred.

#### **ELIGIBLE PARTICIPANTS**

The Alliant Energy Foundation matches financial contributions made by the employees of Alliant Energy and its subsidiaries, retirees of Alliant Energy and its predecessor companies, and members of the corporate Board of Directors.

#### **ELIGIBLE INSTITUTIONS**

Charitable organizations holding a current Section 501(c)(3) designation letter from the Internal Revenue Service, fully accredited public or private schools and universities, and instruments of a federal, state or local government as provided by Section 170(c)(3) of the Code all gualify for a matching gift. Copies of state Certificates of Tax Exemption and/or of tax returns are not acceptable forms of documentation. Please see "Ineligible Contributions" below for examples of ineligible institutions. If you are unsure your organization is eligible, please contact the Foundation staff.

Examples of eligible institutions:

- A charitable organization recognized by the IRS:
- A governmental entity in support of a charitable purpose:
- · An educational institution located in the United States that holds accreditation appropriate to the level of the school;
- · A Fund, Foundation or Association that transmits all contributions directly to an eligible organization.

## **ELIGIBLE CONTRIBUTIONS**

To be eligible for a Matching Gifts donation from the Alliant Energy Foundation, a contribution must be:

- A gift made by an individual person who is an eligible participant (see above) in the program;
- An actual donation, not a pledge;
- Made directly to a qualified and eligible institution or organization;
- Purely charitable; the individual donor cannot receive a benefit or gift as a result of the contribution (i.e., membership dues and subscription or tuition payments, which do not qualify for matching funds):
- A personal contribution by the donor; it cannot come from funds provided by other individuals or groups. For example, in walk-a-thon events, forms must be submitted by each eligible contributor, not pooled by the walker.

## **INELIGIBLE CONTRIBUTIONS**

The Alliant Energy Foundation will not contribute matching funds in these cases:

- · Gifts made to religious institutions such as churches, synagogues, temples and other houses of worship, or to any organization whose main purpose is to promote a specific faith, creed or religion and/or direct resources to advocate for a specific ideology;
- · Gifts that support political parties or candidates, advocacy programs, or religious, athletic, social or fraternal organizations;
- In-kind donations (the value of personal services or donated materials, goods, etc.);
- · Contributions to intermediary ("third party") funding groups whose sole purpose is to raise money to distribute to other charities;
- Donations to United Way, which is already supported by the Alliant Energy family of companies and the Alliant Energy Foundation as a result of annual employee-giving campaigns.

#### INTERPRETATION OF THE PROGRAM

Any questions regarding the interpretation of this program should be directed to Bonnie Beach, Alliant Energy Foundation (phone 1-800-255-4268, extension 458-4483).

To assure the Foundation is in compliance with IRS regulations, the Board of Directors has determined that gifts given to athletic programs at colleges and universities will be matched at 80 percent of the amount of the contribution. Likewise, donors who receive a direct personal benefit from their gift (e.g., event admissions, merchandise, membership privileges or discounts) may only request a Matching Gift for the donation amount less the monetary value of any benefits received.

The Board of Directors of the Alliant Energy Foundation is the final authority and reserves the right to determine the eligibility of any match.

## SUSPENSION OR TERMINATION OF THE PROGRAM

The Alliant Energy Foundation may suspend, amend, or discontinue the program at any time and reserves the right to determine whether any gift shall be matched.

FOR QUESTIONS REGARDING PROGRAM ADMINISTRATION AND YOUR SPECIFIC GIVING HISTORY, please contact The JK Group: Phone: 1-866-746-7902

Alliant Energy Foundation Matching Gifts Program c/o The JK Group

E-mail: alliantenergy@easymatch.com

P.O. Box 2325 Princeton, NJ 08543-2325

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