

BMO Financial Group U.S. / BMO Harris Bank

Matching Gift Program Guidelines

BMO Harris Bank will match financial contributions of U.S.-based current employees, retired employees of BMO Harris Bank, as well as members of the Bank's Board of Directors and Honorary Directors, to qualifying nonprofit organizations at a rate of \$.50 for every dollar contributed, up to a maximum payment of \$1,000 from BMO Harris Bank per employee per year. *Contributions must be a minimum of \$100 to qualify for the BMO Harris Bank match.* Please note that applications are processed by the calendar year. Complete applications received by the Community Affairs office by December 31 will be processed for that calendar year. Applications received on January 1 or after cannot be backdated to the previous year. To ensure that your donation is credited to the year you wish, please plan your gifts accordingly.

Eligible Nonprofit Organizations

In order to be eligible for matching gifts, recipient organizations must have qualified for federal income tax exemption under the United States Internal Revenue Code Section 501(c)(3) or hold a special ruling for an exemption. The funds must be used for direct support of the organization's programs. The organization must also be able to provide BMO Harris Bank with a completed W9 form. Consistent with BMO Harris Bank's corporate values, we cannot support nonprofit organizations that employ discriminatory practices.

Employee and Retiree Qualifications

- **Employees:** Regular full-time or part-time (20 hours/week) employees who have *at least one year of employment* are eligible for matching gifts.
- **Retirees:** Retired employees of BMO Financial Group who are 55 years of age or older with 10+ years of service OR 65 years of age or older with 3+ years of service are eligible.
- Members of the Bank's Board of Directors and Honorary Directors are also eligible.

Non-Eligible Gifts

Contributions that are ***NOT*** eligible for the BMO Harris Bank's match include:

- Insurance premiums
- Government Entitles
- United Way contributions
- Collective/group gifts
- Tuition payments
- Membership dues and/or benefits, or subscriptions fees
- Conference expenses
- Tithes to religious organizations
- Fraternal organizations
- Advertisements in souvenir and program books
- Fees for service
- Elementary, secondary or private elementary and secondary schools
- Games of chance or lotteries
- Donations made to individual churches or religious organizations for the purpose of proselytizing
- Nonprofit organizations that employ discriminatory practices
- Testimonial or fundraising events (including walks, runs, bike rides, dinner events, etc.)
- Contributions made through the BMO Employee Giving Program

Application Process: To apply, please complete the form and forward it to the selected organization along with your donation. (Only current employees are required to include their hire date.) The organization then must go to the following link to complete the Matching Gift Application form online. Please note that Matching Gifts are distributed bi-weekly.

https://gooddonegreat.com/a/grant/bmo_harris_gift

The Community Affairs Department determines the interpretation, application and administration of the Matching Gift Program. BMO Harris Bank may suspend, revoke, amend or terminate this program at any time. If you would like additional information, please call the Community Affairs Department at (312) 461-5834.

MATCHING GIFT APPLICATION FORM

Please print. Before filling out form, please read the guidelines for eligibility of gift and organization

Name: _____

Employee Status: ☐ Employee ☐ Retiree

Date of Hire (current employees only): _____

Employee / Retiree Email Address: _____

Retiree Phone Number: (_____) _____

Employer (or Former Employer if Retired):
(Check only one): ☐ BMO Financial Group ☐ BMO Capital Markets

Type of Gift: ☐ Cash ☐ Stock

Organization's Name _____

\$ _____ Monetary Gift or _____ (Number) shares of (description) _____

☐ I request the recipient report this gift to BMO Harris Bank in application for a matching gift contribution.

Employee Signature _____ Date: _____

Please forward this form along with your donation to the selected organization.
The organization will complete the Matching Gift Application online at Grant Requests:

https://gooddonegreat.com/a/grant/bmo_harris_gift
DO NOT SEND THIS FORM TO BMO HARRIS BANK

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Community Affairs Office use only:

☐ Employment verified
☐ 501 © (3) status verified
☐ Approved ☐ Declined