

Barings Matching Gifts Program – United States

What is the U.S. Matching Gifts Program?

Barings is committed to making a difference in the communities where its employees live and work through support of civic, philanthropic and non profit initiatives. Barings U.S. Matching Gifts Program is designed to bolster charitable giving by expanding the reach of associate's contributions to have a greater impact on the cases that are important to them.

All U.S. matching gift requests are administered online through Barings U.S. Matching Gifts Program portal, administered by Good Done Great.

Associates may choose to either:

- Donate via credit card and request a matching gift entirely online
- Donate directly to an eligible organization and then enter the matching gift request online via the porta

Who is eligible to participate in the Barings Matching Gift Program?

Barings will match personal contributions by associates of \$25 or more, up to \$2,500 annually to a qualifying organization at a 1:1 ratio. The annual limit for members of the Senior Management Team is \$5,000.



What is the process for making a donation through the U.S. Matching Gift Program?

You may access the Matching Gift Program through the Inside Barings homepage, under In the Community, Matching Gifts

To donate via credit card and request a matching gift entirely online:

1. Click on the Make a Donation and/or Request a Matching Gift button on the left side of the page.
2. Click on blue button to **Donate Now and Request a Matching Gift by Credit/Debit Card** and follow instructions to complete your donation.

To donate directly to an eligible organization and then enter the matching gift request online:

1. Click on the Make a Donation and/or Request a Matching Gift button on the left side of the page.
2. Click on blue button to **Request a Matching Gift for a Donation Already Made by Check, Cash or Credit Card** and following instructions to complete your request.

NOTE: If you do not see the organization you wish to support in the recipient list, click on the Search for More Charities button and enter search terms for the appropriate organization. If you have given to the organization in the past and requested a matching gift, it should be included in your Favorites.

If the organization you wish to support is not listed in the expanded search, click on the Submit a New Organization button and enter the legal name of the organization and contact information.

Barings Matching Gifts Program – United States

How do I check the status of my donation and/or my giving history?

After you have completed submitting your request, you can check your Giving History or check the Message Center at the top left of the page to see the status of your request. Statuses include: pending agency verification, pending organization eligibility, approved, declined or paid.

The Matching Gift Center will validate your eligibility and verify your gift with the organization. Once verified, the status of the request will then change to approved, and the request will be entered into the next quarterly payout. After approval, the matching gift will be sent directly to the organization during the next scheduled payout distribution in mid-April, July, October or January.

Associates can log on to the Matching Gifts portal at any time to get an updated report of their giving history.

What types of organizations are eligible to receive a matching gift?

Eligible recipient organizations must operate on a not-for-profit basis and be located in and serve the people of the United States. They must also be certified for tax-exempt status under Section 501(c)(3) of the Internal Revenue Code with the exception of public K-12 schools and municipal organizations.

Questions related to the Matching Gifts Program should be directed to: matchinggifts@barings.com or to Amber Lo at 413-226-1616

Barings WILL NOT contribute matching funds in these cases:

- Requests registered after January 31st of the year after the donation was made
- Gifts made with funds provided to the employee for donation purposes by other individuals (i.e. pooled/grouped funds)
- Gifts to churches and religious organizations
- Gifts to political or fraternal organizations or athletic booster clubs
- Gifts to organizations that are not tax-exempt under Section 501(c)(3) of the Internal Revenue Code, or are otherwise ineligible
- Gifts to individuals
- Alumni dues, individual memberships or subscription fees for publications
- Payments that cover the cost of services, tuition, books or student fees
- Ticket purchases or gifts where direct value is received
- Gifts made with the primary intent to receive specific merchandise, such as school memorabilia, status auto tags, special edition publications, etc.
- Gifts to scholarship funds resulting in direct benefit to self or a family member
- In-kind services, materials, supplies or pledges
- Payments to satisfy legal obligations
- Gifts to federated campaigns (e.g. United Way, United Negro College Fund, The American Indian College Fund, Hispanic Association of Colleges and Universities, etc.)

Donor Advised Funds

Donations to donor advised funds (e.g. Schwab Charitable Fund, Fidelity Charitable Gift Fund) are excluded, however Barings will match the directed gift from the donor advised fund to the charitable organization. Within the portal, choose Request a Matching Gift for a Donation Already Made by Check, Cash or Credit Card and enter the name of the DAF in the Check Number/Donor Advised Fund Name box

BARINGS