

## Alfred Benesch & Company Matching Gift Program Guidelines

### WHO CAN PARTICIPATE?

- Active full-time and part-time employees of Alfred Benesch & Company (Benesch) who have been employed for a minimum of six months are eligible to participate.
- Current members of Alfred Benesch & Company's Board of Directors are eligible to participate.
- Individuals who are not eligible include but are not limited to spouses, family members, interns, terminated employees and those on long-term disability.

### ELIGIBLE ORGANIZATIONS

Eligible organizations must be recognized as a public charity (nonprofit organization) located in the United States and be recognized by the Internal Revenue Service as tax-exempt 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. Example eligible nonprofits include:

- Civic and community organizations
- Health and human services
- Arts and cultural organizations
- Environmental organizations
- Educational institutions (public & private with no discriminatory or exclusionary practices)
- And most other nonprofits

### ORGANIZATIONS NOT ELIGIBLE FOR MATCHING PROGRAM

- Political causes or organizations that engage in political activities
- Religious organizations except those with a social services program that operates separately from the religious entity (the program *must* have its own tax-exempt status)
- Gifts made in lieu of tuition payment, services, or expenses (including books, fees, trips, etc.)
- Membership fees
- Dues to alumni (ae) or similar groups
- Community Trusts or Family Foundations
- Insurance premiums
- Real Estate, in-kind or non-monetary contributions
- Organizations that discriminate based on race, ethnicity, gender, religion, sexual orientation, age or have exclusionary practices
- Group Gifts – only Benesch employees' own contribution will be matched

### HOW THE PROGRAM WORKS

- Alfred Benesch & Company will match a personal gift from the donor's personal funds at a rate of 1:1. **The gift must be a verified personal monetary contribution**, not a pledge to contribute.
- **The minimum gift eligible for matching is \$25. The maximum amount matched is \$500.**
- The Benesch Matching Gift Program will match up to \$500 per Employee per calendar year.

- The company match is limited to the portion of the donor's gift that is tax deductible.
- No goods or services may be received by the employee, the employees' family or any other designated individual in exchange for any portion of the matching gift.

### HOW TO CONTRIBUTE

It is the responsibility of the **DONOR** to:

- Complete Part 1 of the original application form which can be obtained through the Benesch Intranet.
- Mail the original application form, with the monetary donation and any other necessary documentation, to the organization of choice that meets the criteria listed in these guidelines.

It is the responsibility of the **ORGANIZATION** to:

- Complete Part 2 of the original application form. The authorized officer of the organization must verify the donation, sign the application form and return the original application form along with a copy of their Internal Revenue Service 501(c)(3) or by Section 170(c)(1) determination letter to:

Alfred Benesch & Company  
Attn: Benesch Matching Gift Program  
205 N Michigan Ave, Suite 2400  
Chicago, Illinois 60601

After verification that your gift has been received and the organization qualifies for the Benesch Matching Gift Program, a check will be sent to the selected organization by Alfred Benesch & Company.

The matching gift request must be received by the Alfred Benesch & Company Matching Gift Program within six months of the date of payment.

Requests received after that time will not be honored. All gifts must be verified by the recipient organizations in order to be matched by Alfred Benesch & Company.

For more information, please contact the Alfred Benesch & Company Matching Gift Program via email at [CSR@benesch.com](mailto:CSR@benesch.com) or by phone at 312-565-0450.

### ADMINISTRATIVE CONDITIONS

Alfred Benesch & Company reserves the right to amend, suspend or terminate this program without notice at any time and to deny requests for matches for any reason at its discretion.

If any matching activity is found at any time to have been generated by or for an ineligible person, donation, or organization, Alfred Benesch & Company reserves the right to request return of funds.

| Instructions   | Office Use Only |
|--|-----------------|
| <p>It is the responsibility of the <b>DONOR</b> to:</p> <ul style="list-style-type: none"> <li>• Complete Part 1 of the original application form which can be obtained through the Benesch Intranet.</li> <li>• Mail the original application form, with the monetary donation and any other necessary documentation, to the organization of choice that meets the criteria listed in these guidelines.</li> </ul> <p>It is the responsibility of the <b>ORGANIZATION</b> to:</p> <ul style="list-style-type: none"> <li>• Complete Part 2 of the original application form. The authorized officer of the organization must verify the donation, sign the application form and return the original application form along with a copy of their Internal Revenue Service 501(c)(3) or 170(c)(1) determination letter to the address found below.</li> </ul> |                 |

**PART 1 (Completed by Donor)**

Employee Name (Print): \_\_\_\_\_ Employee Number: \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Work Phone: \_\_\_\_\_ Work Email: \_\_\_\_\_  
 Name of Organization: \_\_\_\_\_  
 Organization City/State: \_\_\_\_\_  
 Gift Amount: \_\_\_\_\_ Date of Gift: \_\_\_\_\_  
 Amount to be Matched (\$25 min / \$500 max): \_\_\_\_\_

**Certification Statement:**

I certify that the information I have provided is complete and correct to the best of my knowledge, and that my gift complies with the provisions of Alfred Benesch & Company’s Matching Gift Program. In addition, I understand that donations by employees of Alfred Benesch & Company are subject to the provisions of the Matching Gift Program and submission of this request form does not guarantee a matching gift will be made on my behalf.

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**PART 2 (Completed by Recipient Organization)**

Federal Employer Identification Number (EIN): \_\_\_\_\_  
 Recipient Organization Name: \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Telephone (incl. Area Code): \_\_\_\_\_ Fax (incl. Area Code): \_\_\_\_\_  
 Email: \_\_\_\_\_ Website (if applies): \_\_\_\_\_  
 Amount of Gift: \_\_\_\_\_ Date Received: \_\_\_\_\_ Tax Deductible Gift Amount: \_\_\_\_\_

**Certification Statement:**

**I hereby certify that this organization has received the gift in the amount stated above and meets the eligibility requirements of the Matching Gift Program in accordance with Alfred Benesch & Company’s eligibility criteria provided in the attached Matching Gift Program Guidelines administered by Alfred Benesch & Company.**

Authorized Officer’s Name (please print): \_\_\_\_\_  
 Title (please print): \_\_\_\_\_

Signature of Authorized Officer: \_\_\_\_\_ Date: \_\_\_\_\_

Please enclose a copy of your 501(c)(3) or 170(c)(1) IRS determination letter and a brief description or your organizations mission statement or purpose with this completed form to:

Alfred Benesch & Company  
 Attn: Benesch Matching Gift Program  
 205 N. Michigan Avenue, Suite 2400  
 Chicago, Illinois 60601  
[CSR@benesch.com](mailto:CSR@benesch.com)

Alfred Benesch & Company reserves the right to modify or discontinue this program at any time without notice. Determinations as to the eligibility of Matching Gifts remain solely with Alfred Benesch & Company and submission of the completed form does not guarantee a Matching Gift will be made to the Recipient Organization. In addition, determination as to the eligibility of the Recipient Organization remains the sole discretion of Alfred Benesch & Company. Previous Matching Gifts do not guarantee the Recipient Organization of future Matching Gifts.