

Matching Gifts

The Matching Gifts Program leverages the financial contributions employees make to a broad range of eligible nonprofit organizations dedicated to strengthening the communities in which we live and work.

How the Program Operates

Berkadia Commercial Mortgage LLC ("Berkadia") provides a **dollar-for-dollar match** of any contributions you make to eligible nonprofit organizations, up to \$500 per employee annually. The minimum contribution to any eligible organization that will qualify for matching is \$25. Within these limits, this program will effectively enable you to double the benefit of your contributions to the organizations of your choice.

What Contributions Are Eligible?

- Must be a personal gift, from the employee's personal funds, which has been paid and not simply pledged. The minimum gifts eligible for matching is US\$25.
- The nonprofit organization must be recognized by the US Internal Revenue Service as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS code or an instrumentality of a federal, state, or local government as provided by Section 170(c)(1) of the IRS Code.
- For non-US based charities, the organization must be recognized as a registered charity in the country in which the employee resides.
- Gifts must be in the form of cash, check/cheque, credit card, or marketable securities with a quoted market value. Gifts of securities are valued based on the closing price on the date of contribution. No other form of personal or real property will be matched.
- Donations to churches, synagogues, etc. will be accepted as long as **they are made for a specific human service related purpose**; i.e., education, child care center, food banks, homeless shelter, etc. Matching requests for religious organizations must include a receipt of acknowledgment letter that clearly states a specific human service was performed in conjunction with the contribution.

What Contributions Are NOT eligible?

- Gifts to political parties
- Gifts to colleges and universities
- Donations to athletic scholarships, funds, foundations or facilities, or
- Alumni(ae) dues or dues for similar groups
- Tuition payments, contributions made in lieu of tuition or fees, tickets, dues, meals, parking or other benefit
- Gifts to Parent Teacher Associations (PTA), Parent Teacher Student Associations (PTSA), Parent Teacher Organizations (PTO), Parent Advisory Councils, booster club or similar organizations
- Gifts intended to fulfill the tithe or any church-related financial commitment
- Bequests; life income trust arrangements;
- Any gifts that restrict the immediate use of funds by the nonprofit organization
- Insurance premiums
- Membership dues for which benefits are received
- Technical or professional associations
- Those which pose a legal conflict-of-interest for either the corporation or the applicant employee

Berkadia reserves the right to further restrict gifts based on the availability of funds.

BERKADIA™
Community Initiatives
Matching Gifts Request

DATE: _____

TO: **Community Initiatives**
Horsham, PA

FROM: _____

Employee Name

Office location

Phone number

I am requesting Berkadia match my recent contribution to the following organization:

Name & Address of
Organization (where the
check will be mailed):

Tax ID Number: _____

Date of Contribution: _____

Amount of Contribution: \$ _____

Please send an e-mail to the Community Initiatives mailbox with this completed form and a copy of your cancelled check, on-line donation receipt, credit card or statement of acknowledgement from the organization.

FOR COMMUNITY INITIATIVES ONLY:

Match Approved: _____ Dollar Amount: _____
Match not approved: _____ Reasons: _____

Community Initiatives
Signature: _____ Date: _____

Comments: _____
