

# BLUCORA

## Blucora Inc. Charitable Gift Matching Program Guidelines

### Objectives

Blucora, Inc. (the Company) believes in supporting acts of giving and the organizations that inspire people to give. To foster this belief, the Company has established a charitable gift matching program. Each year, a portion of the Company's budget will be dedicated to providing dollar for dollar charitable gift matching for contributions made by eligible employees of Blucora.

### Eligible Donors

If you are a regular benefits eligible Blucora employee, you are eligible to participate in the Company's matching program. Interns, temporary employees, vendors, and contractors are not eligible to participate in this program.

### Matching Limits

The Company will match up to \$250 per calendar year in contributions you make to eligible charitable organizations or educational institutions. If you have made a Giving Campaign pledge or gift, the matching portion will be deducted from your \$250 matching limit. Matching gift requests must be received within six months of the date of the completed matching gifts form in order to qualify for the match. The Company will match charitable gifts made by cash, personal check, credit card, or securities. Contributions by eligible employees must be for personal gifts of \$25 or more, and the contributions must be actually paid, not merely pledged. Charitable gift matching forms for contributions less than \$25 will not be honored.

### Ineligible Gifts

The program cannot match payments such as:

- Gifts to non-academic programs under the general sponsorship of a School such as athletic teams, school choirs, bands, drill teams, PTA
- Tuition payments, memberships, subscriptions, dues, and loan repayments
- Contributions that result in you as the donor, or a family member of the donor, receiving a direct personal benefit (i.e., special treatment, gifts, dues, dinner, raffle and/or sporting events tickets or membership privileges, etc.)
- A pledge for payment not yet made

### Eligible Organizations and Institutions

All eligible organizations must be located in the United States or one of its possessions and be recognized by the Internal Revenue Service as tax-exempt and designated a public charity 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.

- Private and public degree-granting colleges & Universities, two-year colleges, graduate & professional schools, technical & specialized schools, seminaries and theological schools, public & privately supported primary & secondary schools
- Tax-exempt alumni funds, fundraising foundations, and associations whose exclusive purpose is the support of one of these educational institutions (wholly charitable donations to these institutions are eligible for matching gifts and that tuition payments, annual membership dues, or any similar payment providing a benefit to the donor or any other private individual cannot be paid directly or indirectly through this program.)
- Funding Federations with a 501(c)(3) public charity status, such as United Way, that provide financial support & advocacy for a group of member non-profit organizations
- Community Foundations with a 501(c)(3) public charity status must provide a mission statement, as well as a letter indicating that the Blucora charitable gift matching funds will be distributed according to the Blucora Charitable Gift Matching Program guidelines, to be considered for matching.

### Ineligible Organizations and Institutions

In keeping with the policies of the Blucora Charitable Gift Matching Program, the following organizations are not eligible to receive matching gifts:

- Private foundations, private charitable gift funds maintained by Public charities (e.g., donor advised funds and supporting Organizations)
- Organizations that discriminate for any reason, including race, color, Religion, creed, age, gender, sexual orientation or national origin
- Political organizations or activities which in any way influence Legislation
- Veteran's organizations
- Labor organizations
- Fraternal organizations
- Scouting organizations
- Religious organizations (The Blucora Charitable Gift Matching Program will only match gifts to religious organizations when the gift is designated to an ongoing secular community service program or educational program sponsored by these organizations and does not propagate a belief in a specific faith. These programs must have a formal mission and separate program budget. Further, the benefits of this gift must not be limited exclusively to the organization's members. Some examples of these types of programs are homelessness projects, food banks, shelters.)

### Requesting a Matching Gift

Complete Part A of the matching gift form. Send the form along with your gift (cash, stock) to a qualified organization or institution. The organization will complete Part B of the form and return the entire form to the address indicated on the gift matching form. Faxed copies are not accepted, as the form must have original signatures of both the donor and the recipient organization.

### Gifts of Securities

Blucora will match gifts of all securities having a quoted market value and will match the dollar value of the stock at its fair market price on the date that the actual transfer of stock from you to the organization or institution occurs. Please contact your broker for stock transfer procedures and to determine the fair market value on the date of transfer. Please indicate on the matching form the number of shares donated, the date of transfer, and the fair market value of the stock. If this information is missing, processing will be delayed.

### When Matching Gifts are distributed

Once the matching gift form has been returned to Blucora by the charitable organization, matching gifts will be distributed as soon as administratively possible.

### Administrative Conditions

The Blucora Gift Matching Program is administered by the Blucora, Inc. As such, the Company reserves the right to have final approval of all gift matching, and reserves the right to suspend, limit, change, revoke or terminate this program at any time without liability or responsibility for matching any pending or completed but yet unmatched gifts. Blucora also reserves the right not to match all or any portion of a gift if a deductible portion cannot easily be determined.

### For More Information

If you have questions about the gift matching program, please e-mail [hr@Blucora.com](mailto:hr@Blucora.com) or call 425-201-6100.

# BLUCORA™

## Blucora, Inc. Charitable Gift Matching Program Application

### **PART A:** To be completed by employee.

#### **Employee Information**

Employee is to complete Part A and mail the entire form with your contribution or printed receipt to the organization (incomplete information may result in a delay in matching).

\_\_\_\_\_  
Employee Name

\_\_\_\_\_  
Home Address

\_\_\_\_\_  
City State Zip

#### **Gift Information**

Type of Gift:  cash  check  Credit Card

\$ \_\_\_\_\_ \$ \_\_\_\_\_  
Amount of Gift (min \$25) Amount of Gift to be matched

\_\_\_\_\_  
Securities information (if applicable)

\_\_\_\_\_  
Name of stock Date of transfer

\_\_\_\_\_  
Number of shares and market value on date of transfer

#### **Organization Information**

\_\_\_\_\_  
Organization Name

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Program Designation (required of gift if through a religious organization)

I hereby certify that I am making this personal gift under the conditions stated in the program guidelines and authorize the recipient institution to report my gift to Blucora, Inc. I also certify that my gift does not represent payment in exchange for benefits received.

\_\_\_\_\_  
Signature Date

### **PART B:** To be completed by organization.

#### **Institution or Organization Information**

To be completed by the Financial Officer (or other qualified officer) of the recipient institution. If this is the first time you are requesting a matching gift from the Blucora, Inc Gift Matching Program, please enclose a copy of your Department of Treasury 501(c)(3) tax-exempt document and mail the form and any attached receipt or documentation to the following address:

**Blucora, Inc.  
Gift Matching Program  
Attn: Human Resources  
10900 NE 8<sup>th</sup> St, Suite 800  
Bellevue, WA 98004**

I certify that the gift in the amount of \$\_\_\_\_\_, of which \$\_\_\_\_\_ is tax deductible, and the matching gifts form was received on \_\_\_\_\_ 20 \_\_, and that this organization is an eligible recipient and meets the conditions of Blucora, Inc. Gift Matching Program as specified on this form.

Please type or print the information below:

\_\_\_\_\_  
Employer ID Number

\_\_\_\_\_  
Organization Name

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Phone Fax

\_\_\_\_\_  
Email Address Website

Type of organization (please check one):  Arts/Cultural

Civic  Education  Environment  Human Services

\_\_\_\_\_  
Name of Officer

\_\_\_\_\_  
Title of Officer