

Matching Gifts Program Guidelines

- > [Introduction](#)
- > [Eligible Participants](#)
- > [Eligible Organizations](#)
- > [Eligible Contributions](#)
- > [Fundraising Matching](#)
- > [Contributions That Are NOT Eligible](#)
- > [Logistics](#)
- > [Additional Information](#)

Introduction

Franklin Templeton Investments encourages and supports employees' community involvement efforts. Our Matching Gifts Program provides matching funds to charitable organizations that employees contribute to, and/or funds raised through an individual's personal efforts for a charitable organization. We match donations made by eligible employees, dollar for dollar, when made to qualifying organizations. The match may include a Individual Match, Fundraising Match, or any combination of the two, up to a maximum of US\$500 per employee per fiscal year. Fiscal year is from October 1 – September 30.

Eligible Participants

Any active, regular Franklin Templeton Investments employee in the United States or Canada, (or any of it's subsidiaries) who works 20 or more hours per week, and who has worked at Franklin Templeton for at least 3 consecutive months. Retirees, interns, temps, and contractors are not eligible to participate.

Eligible Organizations

Eligible organizations must be recognized as tax-exempt by the Internal Revenue Service under Section 501(c)(3) and 509(a)(1,2 or 3) of the Internal Revenue Code or by the Canada Customs Revue Board. In addition, gifts to publicly and privately funded schools, colleges and universities will be matched if they are accredited by a nationally recognized accrediting agency or a state department of education.

Some restrictions may apply:

- Alumni funds, foundations and associations may be eligible if the schools they represent are acceptable
- Hospitals must be tax-exempt, not-for-profit public or voluntary institutions accredited by the Joint Commission on Accreditation of Hospitals.
- Volunteer fire companies, ambulance and rescue squads, recognized as tax-exempt by the Internal Revenue Service under Section 501(c)(4) of the Internal Revenue Service Code, are also eligible for matching gifts.
- Arts and cultural organizations must be open to and operated for the benefit of the general public.

The following organizations generally do NOT qualify:

- Organizations whose policies are inconsistent with national equal opportunity policies or discriminate against a person or a group on the basis of race, ethnicity, religion, national origin, sexual orientation, disability, gender, political affiliation or age.
- Religious organizations. (Faith-based agencies are eligible if they have 501(c)(3) status and delivery of social services does not discriminate.)
- Political, fraternal, or labor organizations.

[Back to Top](#)

Eligible Contributions

- Donations must be personal contributions from the donor's personal funds OR qualify for Fundraising Matching (see below).
- For gifts of installments, each installment must be submitted in a separate matching gift request and must be US\$25 minimum.
- Minimum donation eligible for matching is US\$25.
- Maximum match is US\$500 per employee per fiscal year.
- The donor's limit is calculated per fiscal year.
- The donor's limit is based on the date of the gift, not the date the matching request is submitted.
- Gifts must be paid, not simply pledged
- Gifts must be in the form of cash, check, credit card, or marketable securities with a quoted market value. Gifts of securities are valued based on the average of the high and low on the date of the gift. No other form of personal or real property will be matched

[Back to Top](#)

Fundraising Matching

Under the fundraising component of the Matching Gifts Program, an eligible employee may collect funds on their own time from individuals to sponsor an event in which the employee is a participant (see the Employee Handbook for restrictions on solicitation at work). The employee may request a match and be eligible up to the US\$500 maximum limit. Examples of qualifying fundraising activities include walks, marathons, bike rides, or a similar event

- Event must benefit a qualified nonprofit organization (see above).
- Employee must participate in the event in the same fiscal year that the match is requested.
- Funds must be raised through the employee's individual, personal effort and must not violate the Franklin Templeton Solicitation Policy

[Back to Top](#)

Contributions That Are NOT Eligible

- Contributions that are below the minimum of US\$25 or exceed the US\$500 maximum per employee per fiscal year.
- Contributions to individuals or those made for individual needs including tuition, scholarships or other financial aid
- Fundraising event tickets and other contributions that result in you or a family member receiving a benefit (i.e., dinner, raffle, and/or sporting event tickets, parking privileges, booster club dues, memberships, candy sales, etc.)
- Religious donations or tithes (Note: Faith-based agencies are eligible if they have 501 (c)(3) status and delivery of social services does not discriminate.)
- Membership dues (including alumni or similar groups)
- Subscription fees for publications
- Insurance premiums
- Bequests or life income trust arrangements
- With the exception of marketable securities, donations of real or personal property

[Back to Top](#)

Logistics

Online requests should be made via the Matching Gifts website linked from the Franklin Templeton Intranet.

The minimum matching gift request is US\$25. Gifts will be matched on a 1:1 basis up to an annual maximum of US\$500 per employee. Gifts will be matched quarterly per the following schedule:

Matching Request Received:	Funds Distributed:
October - December	January
January - March	April
April - June	July
July - September	October

Employee must request the match within one year of making the donation. Requests after one year from the date of the donation are not eligible. All donor gifts must be verified by the recipient organizations in order to be matched by Franklin Templeton. Note: Donations made prior to April 1, 2006 will not be eligible for matching.

[Back to Top](#)

Additional Information

For more information contact the program administrator, the JK Group:

Telephone: 1-866-337-3792

Email: fti@easymatch.com

Mail:

Franklin Templeton Investments Matching Gifts Program

P.O. Box 8809

Princeton, NJ 08543-8809

USA

[Back to Top](#)

Franklin Templeton reserves the right to interpret, apply, amend or revoke these guidelines at any time without prior notice. Franklin Templeton reserves the right to decline matching funds to organizations whose objectives are deemed inappropriate or create a conflict of interest to Franklin Templeton. The policies and procedures described above are not conditions of employment nor are they intended to create or constitute a contract between Franklin Templeton and any one or all of its employees. All questions concerning the interpretation, application or administration of the Matching Gift Program will be decided upon by Franklin Templeton.

[Back to Top](#)