



# *matching gift program*

**CME FOUNDATION**  
BUILDING FUTURES IN OUR COMMUNITY



Chicago Mercantile Exchange (CME) values the strong, enduring relationships we have cultivated with our members and our employees, and we are especially proud to honor their involvement in the community. The CME Foundation Matching Gift Program provides us with an ongoing opportunity to support causes and organizations important to our members and employees. By joining with our members and employees, CME is able to make a lasting difference in the community.

### Donor Eligibility:

- Active members of CME who have held memberships for at least one year prior to the date of their gift.
- Full-time active employees of CME who have completed at least one year of service prior to the date of their gift.
- Members of the Board of Directors of Chicago Mercantile Exchange Holdings Inc. who have completed at least one year of service prior to the date of their gift.

### Guidelines for Participation:

- Gifts of cash or securities with a quoted market value will be matched on a dollar-for-dollar basis. The value of a gift of securities with a quoted market value is determined by the closing market price on the date of the gift.
- Matching gifts will be made at least four times each year. We anticipate gifts will be made in March, June, October and December.
- Each gift must be a minimum of \$25 and submitted on a separate form.
- The maximum amount matched is \$1,000 per person per calendar year and may consist of any combination of gifts under the program guidelines.
- Matching gifts forms must be received by the CME Foundation by December 15 of the calendar year in order to qualify for the program that year. Forms received after December 15 will qualify for the program in the following year.
- The CME Foundation must receive a completed matching gift form from the recipient organization within 90 days of a donor's gift.
- Matching gifts will be made by check and paid directly to the receiving organization without reference to a specific project or division.
- Confirmation of matching gifts will be forwarded to donors by the CME Foundation after the gift is made.
- The CME Foundation may, if it determines that it is necessary or appropriate to do so, suspend, revise or terminate this program at any time, or limit the aggregate amount of its contributions for members and staff in any calendar year.
- If, in accordance with Program guidelines, there is a question concerning donor or organization eligibility to participate in the Matching Gift Program, the final decision regarding such eligibility will be made by the CME Foundation.

## Organization Qualifications:

Organizations receiving matching gifts from the CME Foundation must be recognized as tax-exempt, nonprofit organizations under Section 501 (c)(3) of the Internal Revenue Code. If applicable, proper accreditation is also required.

Eligible Organizations include, but are not limited to, the following:

- Nonprofit private and public degree-granting graduate and professional schools, universities, four-year and two-year colleges in the United States and Canada
- Public and private elementary and secondary schools in the United States
- Human service agencies providing direct services to children, families, the homeless, victims of domestic abuse, the elderly and people with disabilities
- Cultural institutions, performance and visual arts organizations, museums, zoos, libraries, etc. that are open to the general public

## Ineligible Organizations:

- Any organization that discriminates by race, color, religion, age, sex, sexual orientation, national origin, ancestry, disability, marital status, veteran status or other protected status
- Athletic teams, booster clubs or support organizations
- Private foundations
- Fraternities, sororities and alumni groups
- Religious and political organizations
- Nursing homes, rest homes, convalescent organizations, long-term care facilities and medical research organizations
- Fraternal or veteran organizations
- Ministries, theological or bible schools
- Professional associations
- School choirs, bands or drill teams
- Scouting organizations

## Ineligible Gifts:

- Non-cash gifts, real or personal property or personal services (e.g. works of art, clothing or donated labor)
- Bequests and memorials
- Campaign donations (including United Way)
- Pledges, tithes or tuition payments
- Subscriptions, membership dues, insurance premiums or student fees
- Tickets for cultural or sporting events and benefit dinners
- Raffle or admission payments
- Money collected from a group of people or money paid by sponsors to participants in walkathons, telethons and similar fundraising activities
- Gifts that are made as a consequence of, or lead to, material, direct benefit to the donor, a member of the donor's family or an individual designated by the donor; or are used to satisfy a legal obligation
- Membership or subscription portion of a donation (for example, you donate \$100 to a museum; however, in return you receive a family membership valued at \$60. The matchable portion of your donation is \$40)

**If you have any questions about gift or organization eligibility under the CME Foundation Matching Gift Program, please contact Greg Carroll at (312) 559-4966 or [gcarroll@cme.com](mailto:gcarroll@cme.com).**



# Application for the CME Foundation Matching Gift Program

(please type or print and fill out all items)

## Section A

Donor is to complete Section A and forward the entire application (Sections A and B) to the recipient organization.

☐ Mr. ☐ Ms.

Full Name

Phone

Address

City State Zip Code

E-mail Address

Division/Department/Membership Division

Date of Hire/Date of Membership Activation

Date of Gift (Month/Day/Year)

Recipient Organization

Amount of Gift (\$25.00 minimum for matching)

## Method of Payment

1. Cash (payable by check or credit card) \$

2. Securities of  
Number of Shares Name of Stock

with a quoted market value on the date of gift of \$

per share or a total of \$

I hereby certify that I qualify as an eligible donor and that I am making this gift under the provisions set forth by the guidelines stated on this form.

Signature Date

## Section B

To be completed by the Chief Financial Officer (or other qualified officer) of the recipient organization, after which the entire form is to be mailed to:

CME Foundation  
Matching Gift Program  
c/o Greg Carroll  
20 South Wacker Drive  
Chicago, Illinois 60606-7499

For first-time recipients under the CME Foundation Matching Gift Program, please submit with this application proof of your tax-exempt status, W9 form and accreditation, if applicable.

I certify that a personal gift in the amount of \$ has been received from the above donor and was given without promise or material benefit to the donor or persons designated by the donor, and will not be used to fulfill payment of a pledge, any fees, services or tuition, and that this organization fully complies with the program provisions stated on this form and is classified as a tax-exempt nonprofit organization by the United States Internal Revenue Service.

In Cash Securities\*

\* A letter from the organization should accompany the application identifying the security, the number of units and closing value on the date of the gift.

Signature Date

Name

Title

Organization

Address (City/State/Zip)

E-mail Address Phone

**IMPORTANT NOTE:** The complete application (Sections A and B) must be received by the CME Foundation within 90 days of the date that the donor made the gift. As a reminder, the maximum amount matched is \$1,000 per person per calendar year.