

The D&B Foundation Matching Gift Program



Decide with Confidence

Matching Gift Registration Form

Instructions

Donor: Complete Section A. Use one form for each gift. Please print or type.
Mail with your gift to recipient organization. Do not fax or email.

Recipient: Please complete Section B to verify receipt of gift. Please print or type. Mail form to:
The D&B Foundation Matching Gift Program, P.O. Box 7898, Princeton, NJ 08543-7898

SECTION A: DONOR

First Name Last Name

Social Security Number

Home Address

City

Zip Code

Daytime phone number

Preferred email address

Name of Recipient Institution

City State Zip

Designation, if any (e.g., Chemistry Dept., Business School)

Date of gift _____ \$ Amount of gift _____
Type of gift: Check Securities

Title of security

Number of shares

Valued at

For a total of

I hereby certify that this gift is made entirely from my own personal assets and that it is not in whole or part the gift of others made through me. I further certify that neither my gift nor the company's matching contribution will be used to pay for tuition, fees or dues and that neither I nor my family will derive any direct personal benefit from this contribution.

Donor Signature Date

SECTION B: RECIPIENT INSTITUTION

Name of Institution

Street Address

City State Zip

EIN#

Telephone number

Fax number

Email Address

Date received

I hereby certify that the gift described on this form was received on the date noted and that it qualified for a match under the provisions of The D&B Corporation Foundation Matching Gift Program. In signing this form, I further certify that I am in compliance with the following:

- Both D&B's and the donor's gift will be used for the same purpose. Neither gift will be used for tuition, dues, or subscription fees.
- No goods or services will be provided as a result of this gift.

Certifying Official's Name and Title

Tax-deductible gift amount

Authorized Signature

Date

Questions? – Please contact: The D&B Foundation Matching Gift Program, P.O. Box 7898, Princeton, NJ 08543-7898
Toll-free: 1-877-761-8610 Fax: 1-609-799-8019 Email: dnb@easymatch.com

D&B
Matching Gift Program

The purpose of the D&B Matching Gift Program (the “Program”) is to encourage active D&B associates and current directors to support their communities by matching their gifts to selected types of non-profit organizations.

The Program provides a dollar-for-dollar match of the tax-deductible portion of individual gifts made to approved eligible organizations that are tax-exempt, nonprofit, hold a current Section 501(c)(3) determination letter from the Internal Revenue Service, and are classified by the IRS as a public charity. The process is simple – you may use the website, telephone or mail to register your gift.

HOW TO REGISTER A GIFT - You must first make your donation to an eligible organization.

THEN YOU MAY REGISTER -

BY WEB

- Log on to www.easymatch.com/dnb.
- You will be asked for your user ID and a PIN number. A PIN (or password) will be assigned to you upon your first visit to the site.
- After providing the information required, click on “Submit A New Request”.
- You will receive an e-mail message confirming the request.
- The information you provide will be verified with the recipient organization prior to the gift being matched.

OR

BY PHONE

- Call toll-free 1-877-761-8610, Monday – Friday between the hours of 8AM – 6PM EST.
- You will be asked to provide your Name, Social Security Number, Recipient Organization’s Name/City/State/Zip, amount of gift, date of gift, Purpose /Designation (if any).
- You will receive a confirmation of your request via mail or e-mail, confirming your call-in-match request.
- The information you provide will be verified with the recipient organization prior to the gift being matched.

OR

BY MAIL

- You must use the Matching Gift Registration Form, which is provided as an attachment to this document.
- **You** should complete **Section A** and send the form along with your donation to the recipient organization.

The **recipient organization** should then complete **Section B** and mail the form to:

D&B Foundation
Matching Gifts Program
P. O. Box 7898
Princeton, NJ 08543-7898

YOU WILL BE NOTIFIED OF ANY ISSUES/PROBLEMS ENCOUNTERED IN MATCHING YOUR GIFT.

DONORS

ELIGIBLE PARTICIPANTS

- All U.S. based full-time employees and permanent part-time employees who work more than 20 hours per week
- Current non-employee directors of D&B

INELIGIBLE PARTICIPANTS

- Employees on leave-of-absence or disability
- Retirees
- Former non-employee directors of D&B

ORGANIZATIONS

On the date of the gift, recipient organizations must be recognized as tax-exempt, nonprofit U.S. organizations that hold a certificate under Section 501(c)(3) of the U. S. Internal Revenue Code and are a public charity. The organization must have full-time, paid, professional management; and must be nonsectarian, nonpolitical, and open to full nondiscriminatory public participation. The organization must serve the community at large.

ELIGIBLE ORGANIZATIONS

- Organizations that promote
- Arts and Culture
- Civic Responsibility
- Community Activities
- Health and Welfare
- Educational Organizations
 - Degree-granting two- or four-year private or public colleges or universities, graduate schools, or dental, law or medical schools (including schools and colleges within a university that conduct their own fund-raising efforts) that are accredited by a nationally recognized accrediting association
 - Matching gift funds will be restricted to the same purpose as the donor's own gift
 - Tax-exempt, independent education funds qualify if their sole purpose is to raise money for their constituent member schools, which schools are otherwise individually eligible under the Program (e.g., United Negro College Fund or independent colleges)

INELIGIBLE ORGANIZATIONS

- Those that discriminate on the basis of age, race, sex, disability, religion, ethnic or national origin, or sexual orientation
- Those that are religious in nature or promote a hobby
- Those that do not serve the community at large, and those organizations whose primary mission does not support all people (i.e., one that promotes the advancement of one group to the exclusion of others)
- Those that themselves provide support to other organizations (e.g., United Way)
- **Program guidelines have been amended to include the United Way - City of New York - September 11th Fund**
- Athletic teams
- Labor Unions
- Political Organizations

- Educational Organizations
 - Elementary and secondary schools, both public and private
 - Fraternities, sororities, honor societies, educational associations and campus organizations
 - Seminaries, theological institutions, Bible colleges and religious schools that restrict entry to those students who profess a certain faith or belong to a specific denomination or sect, or where a significant portion of graduates are prepared for a profession in the clergy, religious education or missionary work

GIFTS

Contributions must be charitable contributions that can be deducted by the individual for federal income tax purposes. Only the tax-deductible portion of gifts will be matched. No goods or services of value may be received by the donor, the donor's family, or other designated individuals in exchange for a contribution to a non-profit organization. All matching gift funds will be restricted to the same purpose as the donor's own gift.

ELIGIBLE GIFTS

- Personal cash/check contributions actually paid, not merely pledged, to an eligible organization in support of its primary objective
- Securities having a quoted market value (The value of the securities will be the market value on the date of transfer.)

INELIGIBLE GIFTS

- Money collected from a group of people or money paid by sponsors to participants in walkathons, telethons or similar fundraising activities, as well as gifts paid through a third party (e.g., United Way)
- Non-cash gifts, real or personal property, or personal services (e.g., works of art, rare books, or donated labor)
- Payments for which donors, their families, or other individuals designated by a donor receive a direct benefit (e.g., payment for services, tuition, books, and student fees)

AMOUNTS MATCHED

- Minimum Amount: Only individual gifts of at least \$25 are eligible; group collections are not eligible.
- Maximum Amount: Maximum total gift amount per individual donor that will be matched in a calendar year is \$4,000.
- Eight gifts per participant in a calendar year will be matched.
- The Foundation reserves the right to further restrict gifts based on the availability of funds.

GIFT REGISTRATION

- In order to be matched, gifts must be registered within 90 days of the gift being made.
- For gifts made in the 4th quarter, registration must be made no later than January 15th of the year following the calendar year in which the gift was made. For example: if a gift is made on December 15, 2000, it must be registered no later than January 15, 2001 to be matched.

PROGRAM CHANGES / INTERPRETATION

- The Foundation reserves the right to change the Program from time to time.
- The Executive Director shall be responsible for interpreting and administering the Program and shall utilize D&B values in making final decisions.