

## **DST Catalyst Employee Giving System**

### **Submitting a Matching Gift**

1. Associates should send their contribution directly to the qualified nonprofit organization of their choice. This is a new change to the program and provides associates with the opportunity to make their contribution via check, cash or credit card.
2. Confirm receipt of the gift with the nonprofit organization, and request the organization's U.S. Tax ID/EIN or NCES ID. You will need these to complete the Matching Gifts request process.
3. Click the on the right side of this space. This will take you to the DST Catalyst Employee Giving System.
4. Once you have logged in, click on the "Matching Gift Request" tab and complete the required information.

### **Matching Gift qualifications:**

1. The deadline each year is December 15.
2. The contribution must come from the personal funds of an associate. The minimum contribution for associates and officers is \$50. The maximum contribution is \$10,000 per associate per calendar year. The maximum for officers is \$20,000 per year.
3. The match requested must go to a nonprofit organization that meets 501(c)3 requirements as defined by the Internal Revenue Service.
4. The contributor must be a DST associate based in the United States. (Boston Financial Data Services associates participate in a separate program and should contact their local HR department.)

### **Please note exclusions for the following contribution-types:**

1. Educational Institutions
  - a. Tuition, fees and contributions for athletics or non-academic extra circular activities
  - b. Calls or alumni dues
  - c. Gifts of personal or real property
2. Gifts to churches and other ecclesiastically oriented institutions or programs are covered for community outreach services and capital campaigns only.
3. Fraternal Orders, political or labor organizations
4. Donations that include a "membership" where benefits are received by an associate
5. Heart of America United Way: For Kansas City locations, DST has an annual campaign and the company makes a substantial donation to match a portion of the dollars given. United Way contributions for areas outside the Kansas City metropolitan area are acceptable and will be matched under the Matching Gifts

program. Donations by associates outside the KC metro area may not be made through Payroll Deduction.

6. In compliance with DST's no solicitation-no distribution policy, gifts to pledge-based organizations through solicitation for walk-a-thons, bowl-a-thons, run-a-thons and bike-a-thons are excluded.