

# **DST Systems, Inc.**

## **Matching Gift Guidelines**

Welcome to the 2014 Matching Gifts program for DST Systems, Inc. The purpose of this plan is to encourage directors, officers and associates of DST Systems, Inc. and approved subsidiaries to support qualifying charitable organizations.

### **CONTRIBUTION MINIMUMS AND MAXIMUMS**

MINIMUM contribution each time you give to the charity is \$100.00

MAXIMUM contribution to a single organization is \$10,000 per calendar year.

MAXIMUM contributions in any calendar year is \$10,000.

### **APPLICATION REQUIREMENTS**

Eligibility: The contributor must be employed full time by DST Systems, Inc. or a subsidiary for a minimum of six months. Part-time, temporary workers, contractors, clients, or vendors are not eligible to participate in Matching Gifts. The contribution must come from the personal funds of the board member, officer or associate in order to be eligible for a matching gift.

Proof of donation: The check or proof of donation must be attached to the application. The EIN ID number is the employer's tax identification number which can be obtained from the charity. If the organization is to receive a matching contribution from DST Systems, Inc., it must meet all 501(c)(3) public operated charitable organization requirements as established by the Internal Revenue Service. Proof of eligibility may be required.

**DEADLINE:** for current year contributions, applications must be received by the Matching Gifts Administrator by November 1, of current year.

#### Contribution Guidelines

A. IRS Subsection:501(c)(3) Public Charity and MINIMUM contribution each time you give to the charity is \$100.00.

B. Contributions to an educational institutions, religious/ecclesiastical institutions or pledge-based organizations are matched except for the following purposes:

1. Heart of America United Way (Kansas City locations): DST has annual campaign and the corporation makes a substantial donation to match a portion of dollars given. United Way for "outlying" areas other than Kansas City metropolitan area are acceptable and will be matched under the matching gifts program. Donations of our outlying associates may not be made through Payroll Deduction.

2. Educational Institutions Exclusions:

- a. Tuition, fees or other charges fixed by the school as a condition of enrollment
- b. Contributions for athletic or other non-academic, extra-curricular activities
- c. Class or alumni dues, insurance premiums, subscriptions, bequests
- d. The value of personal services
- e. Gifts of personal or real property

3. Gifts to churches and other ecclesiastically oriented institutions or programs are covered for community

outreach services or capital campaigns only. Excluded are the following:

- a. Tithes, promise pledges, faith promises, fees or other charges of the church or, tuition to the school associated with the religious workings of the church
  - b. Unrestricted, non-specific donations to religious/ecclesiastically or church oriented charities and activities
  - c. Donations for the purposes of funding religious activities (i.e. missionaries for evangelization, conversions, vocation/clergy/ministry, etc.) or the purchases of religious items for the physical organization. (i.e. (Holy) Scriptures, Statues, proselytization instruction manuals, political signage for protests, etc.)
  - d. The value of volunteer services to go out and do conversion work, evangelization work, etc.
4. Gifts of personal or real property
  5. Fraternal Orders, political or labor organizations are excluded entirely.
  6. Donations that include a "membership", where benefits are received by the associate, will not be fully matched.
  7. In compliance with our no solicitation no distribution policy, gifts to pledge-based organizations through solicitation as in a walk-a-thons, bowl-a-thons, run-a-thons, or bike-a-thons, etc., are excluded. If the donation is direct to the charity not based on solicitation and no goods or services are received, then the donation is considered acceptable. The company supports many pledge-based organizations through corporate contributions.

**? NOTIFICATION ?**

You will be notified by Email that your contribution has been mailed to the charity within 10 business days of receipt.