

## Welcome to the Matching Gifts program for DST Systems, Inc.

DST recognizes the importance of charitable organizations, not only to its associates, but also the communities in which they live and work. The purpose of this plan is to encourage directors, officers and associates of DST Systems, Inc. and approved subsidiaries to support qualifying charitable organizations with a generous company match.

Through this program the Company will match your contributions dollar-for-dollar to qualified 501(c)3 Public organizations. A 501(c)3 charity is a designated not-for-profit organization as established by the Internal Revenue Service. Exceptions are noted on the Matching Gifts Application. Private operating and non-operating charities are not acceptable.

Please use the application form for Matching Gifts that is found on the [right-hand side of this page](#).

**MINIMUM** contribution each time you give to the charity is **\$50.00 (NEW FOR 2015)**

**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 wholly-owned **subsidiary**. 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 **\$50.00****

**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 **is** 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.
  - e. Gifts of personal or real property
4. Fraternal Orders, political or labor organizations are excluded entirely.
5. Donations that include a “**membership**”, where benefits are received by the associate, will not be fully matched.
  6. **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.