



# Application for Matching Gift

**Part 1: To be completed by the donor; please print or type. Send entire form with your gift to the organization.**

Please check one:      Active full-time employee      Date of hire: \_\_\_\_\_  
DTE Energy retiree      Date of retirement: \_\_\_\_\_  
DTE Energy director

**To:** \_\_\_\_\_  
Name of Organization      Address

**From:** \_\_\_\_\_  
Name      ID Number      Email Address  
\_\_\_\_\_  
Company & Work Location      Telephone Number  
\_\_\_\_\_  
Home Address      City      State      Zip

**Amount of gift:** \$ \_\_\_\_\_ (min \$25)

**Type of gift:** Please Check One:      CASH      CHECK      CREDIT CARD      SECURITIES  
Name of Securities \_\_\_\_\_      Market value of (amount) \$ \_\_\_\_\_ on (date) \_\_\_\_\_

If the beneficiary is not located in Michigan, I attended this educational institution from \_\_\_\_\_ (year) to \_\_\_\_\_ (year)

**(Please note: you need to have attended the college or university for at least a year for the gift to be eligible.)**

I hereby certify that this gift fully complies with the terms and objectives of the DTE Energy Foundation Matching Gifts Program on the reverse side of this form.  
\_\_\_\_\_  
Signature      Date of Gift

## Part 2: To be completed by an authorized officer of the beneficiary

\_\_\_\_\_  
Name of organization

\_\_\_\_\_  
Address      City      State      Zip

Amount of gift \$ \_\_\_\_\_      Tax deductible portion \$ \_\_\_\_\_      Date Received \_\_\_\_\_

As an authorized officer of this organization, I hereby certify that the gift described above was received on the date indicated and that it fully complies with the terms and objectives of the DTE Energy Foundation Matching Gifts Program on the reverse side of this form, and that this institution is classified as a 501(c)(3) organization by the Internal Revenue Service.

\_\_\_\_\_  
Name of Authorized Officer      Title      Telephone Number

\_\_\_\_\_  
Signature      Date

**When Part 1 and Part 2 of this form have been completed, return to:**

Community Foundation for Southeast Michigan  
Matching Gift Program  
333 West Fort Street, Ste. 2010  
Detroit, MI 48226  
email: dtmatching@cfsem.org

## Purpose of the program:

The DTE Energy Foundation is dedicated to supporting programs that strengthen the fabric of our communities by developing the potential of their residents, institutions and infrastructure. This support includes educational and cultural organizations that play an important role in improving the quality of life in the communities we serve. These vital organizations depend on voluntary financial donations.

Because of this, the DTE Energy Foundation encourages employees to contribute to these groups and demonstrates its support by matching personal financial gifts.

## Here's How it Works:

- The DTE Energy Foundation will match dollar-for-dollar, tax-deductible gifts of \$25 or more to a combined total of \$5,000 per donor in a calendar year.
- Gifts must be in cash, by check, by credit card, or in securities having a quoted market value on the date made. Gifts must be paid and not merely pledged.
- Gifts may be made by current payment from a tax-exempt 501(c)(3) donor advised fund if the fund has been funded solely by an eligible participant.

**To apply:** Complete **Part 1** of the attached form after you have carefully read the criteria below. Send the entire form, along with your gift to the beneficiary.

The beneficiary should verify receipt of your gift, complete **Part 2** Two of the form, and return the entire form to:

Community Foundation for Southeast Michigan  
Matching Gift Program  
333 West Fort Street, Ste. 2010  
Detroit, MI 48226

email: [dtematching@cfsem.org](mailto:dtematching@cfsem.org)

Eligible requests are processed and granted to organizations on the following quarterly schedule:

|                      |          |         |            |            |
|----------------------|----------|---------|------------|------------|
| <b>Received by:</b>  | April 1  | July 1  | October 1  | January 1  |
| <b>Processed by:</b> | April 30 | July 31 | October 31 | January 31 |

## Who Can Participate?

All full-time, active employees of DTE Energy, retirees, and members of the Board of Directors of DTE Energy or any of its subsidiaries are eligible to apply.

## What Organizations Are Eligible?

To be eligible to receive a DTE Energy Foundation gift, an organization must be a higher educational institution or cultural organization as defined below, and must be able to prove that it is recognized as exempt from Federal Income Tax under section 501(c)(3) of the Internal Revenue Code, and not a private foundation within the meaning of section 509(a)(1),(2), or (3) of the Internal Revenue Code.

## Eligible Educational Organizations

Eligible educational organizations include:

- Any non-profit, fully accredited two-or four-year college or university in Michigan.
- Any two-or four-year college or university in the United States attended by the donor for at least one year which is accredited by one of the six regional associations of schools and colleges or approved by a nationally recognized accrediting agency.
- Tax-exempt funds, foundations, or state/national associations whose sole purpose is to collect and transmit contributions directly to institutions that individually are eligible under the program (e.g., United Negro College Fund).

**Note:** All of the above must be recognized by the IRS as institutions to which contributions are deductible for Federal Income Tax purposes.

## Eligible Cultural Organizations

Eligible cultural organizations must be located in Michigan, be professionally managed, and opened to or operated for the benefit of the public. These include:

- Arts councils and united arts societies;
- Botanical and zoological societies;
- Historic preservation/restoration societies or funds;
- Museums of art, history and science;
- Performing arts companies (dance, drama, opera, music);
- Public libraries
- Public radio and television stations

## Ineligible Gifts

- Gifts given by a third party, except tax-exempt 501(c)(3) donor advised funds that have been solely funded by an eligible participant;
- Pooled gifts of others;
- Gifts to support religious activities, including church pledges, tithes, or related commitments;
- Bequests, life income trusts, insurance premiums or similar payments;
- Gifts to educational institutions for athletic programs;
- Payments in lieu of tuition or other student expenses;
- Personal membership dues;
- Personal or real property, in-kind gifts, or value of personal services;
- Subscription fees for any publications;
- Ticket purchases of any kind;
- Any gift or portion of a gift which accrues personal benefit to the donor or another individual;

The DTE Energy Foundation may suspend, change, revoke or terminate this plan at any time. Questions related to its interpretation, application or administration shall be determined by the DTE Energy Foundation Board of Directors and its decisions will be final.

## Questions should be directed to:

Community Foundation for Southeast Michigan  
Matching Gift Program  
333 West Fort Street, Ste. 2010  
Detroit, MI 48226  
email: [dtematching@cfsem.org](mailto:dtematching@cfsem.org)