



## MATCHING GIFTS PROGRAM GIFT FORM

(A separate gift form must be completed for each college or university.)

### SECTION A - TO BE COMPLETED BY INDIVIDUAL DONOR AND FORWARDED TO THE SCHOOL WITH YOUR GIFT

(Please type or print clearly in ink.)

#### DONOR INFORMATION

Name: \_\_\_\_\_  
Personnel Number: \_\_\_\_\_  
Office Location (U.S. City): \_\_\_\_\_  
Function-Specific Subsidiary: \_\_\_\_\_  
Office Phone #: \_\_\_\_\_  
Office Fax #: \_\_\_\_\_  
Home Phone #: \_\_\_\_\_  
Level: \_\_\_\_\_  
*(Partner, Principal, Director, Senior Manager, etc.)*

Status (for partner/principal/directors only):

Active  Retired

Retirement date: \_\_\_\_\_

#### COLLEGE/UNIVERSITY

Name: \_\_\_\_\_  
City/State: \_\_\_\_\_  
Alumnus of School?  Yes  No  
Degree: \_\_\_\_\_ Date Received: \_\_\_\_\_

#### GIFT DATA

Date of Gift: \_\_\_\_\_  
*(Month, Day, Year)*

Amount: \$ \_\_\_\_\_

**Note: The minimum for each contribution, per school, per fiscal year, that is eligible for matching is \$50 for employees and \$250 for partners/principals/directors.**

Form of Gift:

Cash  Check  Charge  Securities

\_\_\_\_\_ Shares of \_\_\_\_\_

Valued at \$ \_\_\_\_\_ a share

**Gift Designation: The Foundation encourages designation of contributions to academic programs/funds. (see donor instructions on page 3 for eligibility criteria)**

Brief description of gift designation: \_\_\_\_\_

**I hereby certify that the information submitted by me and set forth above is correct and my gift fully complies with program provisions. (MUST BE SIGNED BY ELIGIBLE DONOR—REQUIRED FOR PROCESSING)**

Signature: \_\_\_\_\_

Date signed: \_\_\_\_\_

#### PROCEDURE

- Donor should complete section A (this page) and mail sections A & B of this form with his or her contribution to the school (see donor instructions on page 3 for additional information). By signing in the space above, the donor certifies that such gift complies with the provisions of the Program and authorizes the school to report such gift to the Deloitte Foundation.
- An authorized officer of the school should complete and sign section B, thereby certifying that the contribution has been received and that the gift complies with the provisions of the Program. The school should then mail sections A & B of the form to the Deloitte Foundation Matching Gifts Coordinator, as soon as possible but no later than May 31 of each year.
- The Foundation will process the form and authorize payment of matching contributions in accordance with Program guidelines. Once a year, in October, eligible gifts for a college/university will be matched provided that total eligible contributions from personnel of the Deloitte U.S. Firms are such that the Foundation match will total \$1,000 or more during the fiscal year. Matching checks will be made payable directly to approved colleges/universities. A listing of the name, designation, and amount contributed by each donor will also be provided to each school with a record of gifts matched.

**COLLEGES/UNIVERSITIES: PLEASE COMPLETE SECTION B OF THIS FORM.**

Note: "The Deloitte U.S. Firms" is a reference to Deloitte & Touche USA LLP and its subsidiaries.

**SECTION B - TO BE COMPLETED BY COLLEGE/UNIVERSITY. PLEASE RETURN SECTIONS A & B OF THIS FORM TO THE DELOITTE FOUNDATION NO LATER THAN MAY 31. (Please type or print clearly in ink.)**

I hereby confirm that this Institution is tax exempt under the Internal Revenue Code and certify that the amount of \$\_\_\_\_\_ was received on \_\_\_\_\_ (date) and will be used to support the primary objectives of the institution and fully complies with the program provisions as stated below. **The donor's gift was designated to the following academic program, fund or department (required for processing—please note that gifts to athletic or other non-academic funds are not eligible for match):** \_\_\_\_\_.

Signature of Financial Officer (required for processing--not a stamp) \_\_\_\_\_

\_\_\_\_\_ Date

\_\_\_\_\_ College/University Name

\_\_\_\_\_ Tax I.D. Number

Full Name and Title of Financial Officer: \_\_\_\_\_

Department to Which Check Should Be Directed: \_\_\_\_\_

Street Address or Room/Building: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

\_\_\_\_\_ Contact Phone Number: \_\_\_\_\_

**COLLEGE/UNIVERSITY PROGRAM INSTRUCTIONS**

The Deloitte Foundation will match gifts made by personnel of the Deloitte U.S. Firms to **academic programs** in graduate schools and baccalaureate degree-granting colleges in the United States and Puerto Rico, which have tax-exempt status under the Internal Revenue Code. The program will match any eligible gift made directly to an approved college/university by active employees of the Deloitte U.S. Firms, and active or retired partners, principals and directors of the Deloitte U.S. Firms during the fiscal year (**June 1 - May 31**), subject to the following guidelines:

**Eligible Contributions**

Gifts must be paid, not merely pledged, directly to an approved college/university and must be made by cash, check, credit card charge or in marketable securities. The value of the securities, for the purpose of the Program, will be valued as of the date they are released by the contributor. **Gifts made to institutions of higher education through the United Way or other organizations are not eligible for matching.**

**The minimum for each contribution, per school, per fiscal year, must be no less than \$50 for employees and \$250 for active or retired partners, principals and directors of the Deloitte U.S. Firms.** The Foundation will match aggregate individual contributions to eligible recipient schools, which are made during the Foundation's fiscal year (June 1 to May 31), up to a fiscal year maximum of \$7,500 per donor. Individual gifts to colleges/universities with which the Deloitte U.S. Firms maintains a strategic recruiting relationship (as determined by the Foundation) may be matched up to an additional \$5,000 per school, per donor. **Gifts to an eligible college/university will be matched only if total eligible contributions from Deloitte U.S. Firms personnel are such that the Foundation match will total \$1,000 or more during the fiscal year. Gifts will be matched on a 1:1 basis.**

The Foundation's matching gift will follow the donor's contribution designation. However, if undesignated, the Foundation reserves the right to designate the matching portion of the total contribution to programs, which support the objectives of the Foundation.

Matching will **not** be provided for contributions representing spousal gifts, testamentary bequests, alumni dues, athletic programs or activities, non-academic buildings or other non-academic fund, payment of tuition or student fees, gifts of future interest, life insurance premiums on policies naming the school or any program therein as beneficiary, or any other gift which does not meet the requirements of an eligible contribution as set forth above. **Important Note:** Academic scholarship funds for student athletes are eligible (the fund must be restricted for academic scholarships only). In general, gifts that are designated to a fund that is both academic and non-academic in nature will only be matched if the school can restrict the gift to academic purposes only.

Contributions may be made to an eligible college/university at any time during the calendar year; however, the act of matching such contributions by the Foundation will occur annually. **All applications for the Program must be completed and returned to the Foundation on or before May 31 of each year for matching in October.**

**Procedure**

An authorized officer of the college/university should complete and sign section B above, thereby certifying that the contribution has been received and that, to his/her knowledge, the gift complies with the provisions of the Program. Thereafter, the form should be mailed to the Deloitte Foundation Matching Gifts Coordinator at the address below, as soon as possible but no later than May 31 of each year. **In addition, an IRS ruling should be submitted to the Deloitte Foundation one time annually.**

The Foundation will review the form and will authorize payment of matching contributions in accordance with the provisions of the Program. Once a year, after the Foundation's year end of May 31, eligible gifts for a college/university will be matched provided that total eligible contributions from Deloitte U.S. Firms personnel are such that the Foundation match will total \$1,000 or more during the fiscal year. Matching checks will be made payable directly to approved colleges/universities. A listing of the name, designation, and amount contributed by each donor will be included to provide each school with a record of gifts matched. **Upon receipt of the matching contribution, the school must provide the Deloitte Foundation with a written acknowledgment of the gift in compliance with the Internal Revenue Code.**

**Address requests for further information and all correspondence relating to the Program to: Matching Gifts Coordinator, Deloitte Foundation, Ten Westport Road, P.O. Box 820, Wilton, CT 06897-0820, (203-761-3248).**