

# Matching Gift Plan



## Canada

Deluxe Corporation established the Matching Gift Plan to encourage employees to join the company in financially supporting eligible organizations as outlined in this brochure.

### APPLICATION FORM

#### Part 1: To be completed by eligible donor

1. Read both pages of this brochure to determine whether you are eligible to apply for a matching gift.
2. Complete **ONLY THIS COLUMN** of the application form.
3. Send your contribution and this form to the eligible organization. It is their responsibility to return it to the Deluxe Corporation Foundation office.
4. The Foundation only honors matching gift forms that are received within *four months* of a donor's gift.

Eligible donor's name (first, middle, last)

Employee number

Deluxe facility name and location

Donor's home address

City Province Postal Code

Name of organization receiving your gift

Dollar amount of your gift Date of contribution  
(if securities, include transfer date)

Check appropriate box:

- Accredited school  Professional arts organizations  
 Public (educational) TV and radio  Historical society/museum

I certify that the information submitted is correct, that my gift complies fully with the provisions of the Deluxe Corporation Matching Gift Plan as described in this brochure, and that no benefit or service is accruing to me. I further understand that misrepresentation of this gift will negate any future participation in this plan.

Eligible participant's signature *(Only original signatures will be accepted.)*

Note: This form can be downloaded at [www.deluxe.com/about-deluxe/foundation.jsp](http://www.deluxe.com/about-deluxe/foundation.jsp)

#### Part 2: To be completed by eligible organization

1. Read both pages of this brochure to determine whether your organization meets the requirements of the Matching Gift Plan.
2. Complete **ONLY THIS COLUMN** of the application form.
3. Send the entire application form along with charitable organization certification to the address below.
4. The Foundation only honors matching gift forms that are received within *four months* of a donor's gift.

Name of Organization

Charitable BN/Registration No.

Organization's Address

City Province Postal Code

Phone # Date contribution received

As an authorized officer of this organization, I certify that this organization satisfies the requirements and objectives of Deluxe Corporation's Matching Gift Plan. I also verify that the gift is not in the form of bequests, dues, preferred seating benefits, subscription fees, insurance premiums, tuition, group collections submitted by an individual, or other such payments, and that the gift is bona fide and will not be transferred to another organization.

Authorized officer's name (please print)

Signature *(Only original signatures will be accepted.)*

Title Date

Please return and direct questions to:  
Deluxe Corporation Foundation  
3680 Victoria Street N  
Shoreview, MN 55126-2966 USA  
651-787-5124

The Deluxe Foundation office must receive the completed application form within **FOUR MONTHS** of the donor's gift or **FOUR MONTHS** of the final year-end payment from the donor. **Please send a receipt of Deluxe's matched gift to the Foundation office at the above address.**

## ***Increase your donations***

*to accredited schools, arts organizations, historical societies, museums or public TV and radio by participating in the Deluxe Corporation Matching Gift Plan.*

## **Who's eligible to participate?**

- Full-time and part-time employees

Deluxe only matches gifts made directly to qualified organizations by eligible donors. Gifts made through a private foundation or trusts do not qualify for matching.

## **Which organizations qualify for matching?**

- Accredited schools (colleges, universities, junior colleges, vocational technical institutes, and elementary and secondary schools that are recognized by national accrediting agencies or associations)
- Professional arts organizations
- Historical societies and museums
- Public (educational) TV and radio

### **Other requirements:**

- United States organizations must have appropriate charitable status with the IRS
- Canadian registered charities must provide an accurate ID number and tax exempt status as issued by the Canada Revenue Agency and Charities Directorate.

**IMPORTANT:** The Deluxe Corporation Matching Gift Plan office will not honor matching gifts to organizations associated with controversial activities or primarily concerned with religious or social service activities.

## **“Gifts” defined**

### **Eligible**

Gifts must be personal contributions made—not merely pledged—in cash or securities.

Contributions of securities (stocks and bonds) must include quoted market value on the date of transfer.

If you pay monthly or quarterly installments of your total contribution, please process *one* application form with your total annual contributions at year-end. In addition, the foundation only honors matching gifts that are reported within *four months* of a donor's entire contribution or *four months* following the final year-end payment.

## **Ineligible**

Gifts cannot be in the form of bequests, dues, subscription fees, insurance premiums, tuition, group collections submitted by an individual, or other such payments. Even though such payments ultimately provide financial benefit to an organization, they are not eligible for matching.

## **Amounts matched**

Deluxe double matches qualifying gifts ranging from \$10 to \$2,500 of eligible donors. The \$500 double match benefit is applied to a donor's first matching gift form(s) received in the Deluxe Corporation Foundation office each year. Once the \$500 benefit has been reached, the remaining dollars will be matched on a one-for-one basis. Donors can contact the Deluxe Corporation Foundation office to discuss other options.

Deluxe's office interprets, applies, and administers the Matching Gift Plan. The staff's decisions are *final*.

If total contributions for the year exceed the total amount appropriated for the plan, Deluxe reserves the right to prorate gifts according to available funds. In addition, the office reserves the right to revoke, suspend, or terminate the program at any time and has no obligation to match contributions made after that time.

## **How to participate**

- Complete Part 1 of the application form on the back of this brochure.
- Forward your contribution with this application form to the eligible organization.
- The organization completes Part 2 and sends the completed application form to the Deluxe Corporation Foundation office.
- After receiving the completed application form the Deluxe Corporation Foundation office sends a matching gift to the organization.

The Deluxe Corporation Foundation office will acknowledge the gifts Deluxe matches on your behalf after each quarter that you participate. Because some nonprofit organizations process donations more slowly than others, it may take several months for you to receive a statement with the current contribution data.