

Matching Gifts Program for Education/Culture

INTRODUCTION

We have a Matching Gifts Program for educational and cultural organizations. Education is one of this country's greatest assets. Emerson has always been interested in the welfare of the nation's educational system and has supported education with corporate contributions.

Additionally, Emerson has an acute awareness of the need for support of cultural organizations that enhance any community.

For these reasons Emerson has established a program to encourage its employees to contribute to qualifying organizations of their choice. Subject to the provisions of the plan, as described in this folder, Emerson will match, dollar for dollar, contributions made to such organizations by eligible persons.

WHO IS ELIGIBLE?

- (1) All full-time employees of Emerson, including wholly owned subsidiaries and divisions.
- (2) All active outside members of the Board of Directors of Emerson.

WHICH EDUCATIONAL INSTITUTIONS QUALIFY?

Two-year colleges, four-year colleges, universities, graduate schools, professional schools, technical schools (both public and private institutions), and private secondary schools, provided the following conditions are met:

- (1) The institution must be located within the United States and its possessions.
- (2) It must be a nonprofit institution.
- (3) It must be an accredited institution.
- (4) You can give to a fund, a foundation, or an association that has a tax-exempt status and collects funds for an eligible institution. The United Negro College Fund also qualifies for contributions.

WHICH CULTURAL ORGANIZATIONS QUALIFY?

Theatre, dance, ballet, opera, symphony, concert, choral and/or chamber groups, fine arts, and other cultural organizations, provided the following conditions are met:

- (1) The organization must be located within the United States and its possessions.
- (2) It must be a nonprofit organization.
- (3) You can give to a fund, foundation, or association that has a tax-exempt status and collects funds for an eligible organization.

HOW MUCH WILL BE MATCHED?

Employee donations of \$25 to \$5,000 to cultural and educational institutions will be matched up to a total \$10,000 annually (Oct. 1-Sept. 30). The employee donations cap is \$10,000 for donations to higher educational institutions (two-year colleges, four-year colleges, universities, graduate schools, professional schools and technical schools).

WHAT KIND OF GIFTS WILL BE MATCHED?

Gifts must be personal contributions made, not merely pledged, in cash, check, and/or securities (immediately marketable) with a quoted closing market value (or bid) on the day of trading prior to the date of your gift. Tuition, dues, subscriptions to publications, or similar payments do not qualify. The giver may specify that his or her contribution is to be used for a particular purpose, but the matching gift will be for unrestricted use by the donee.

HOW DO YOU APPLY FOR MATCHING GIFTS?

Fill out the employee's section on the reverse side, enclose your contribution, and send the entire folder to your donee. Matching gift forms are available at your personnel office. *We regret that we cannot accept photocopies of this form.*

WHAT DOES THE ORGANIZATION DO?

If the organization qualifies for a matching gift to be paid by Emerson, as described in this folder, it should fill out the recipient section and mail it to:

Matching Gifts Program
Emerson
8000 W. Florissant, Sta. #3621
P.O. Box 4100
St. Louis, MO 63136

Applications are processed quarterly.



Matching Gifts Program Application Form

EMPLOYEE'S SECTION

Fill out this part and send the entire folder, together with your contribution, to the recipient organization.

Employee name

(print or type)

Home address

City

State

ZIP

Division where employed

Work telephone ()

Division address

City

State

ZIP

Full-time active service since

(employment date)

Name of organization

Gift date

Enclosed is my personal gift of \$

and/or

(stock)

valued at \$

If gift paid in stock, source of quotation

Signature

RECIPIENT SECTION

To be completed by an official of the organization.

Date received

I hereby confirm that the employee's gift of \$

and/or

(stock)

valued at \$

was received by

(name of organization)

Address

City

State

ZIP

Telephone ()

This organization has qualified for Federal Income Tax exemption under U.S. Internal Revenue Code Section 501(c)(3). If this is your first time applying for an Emerson Matching Gift, please submit a copy of your IRS 501(c)(3) and supporting documentation that describes your organization.

Name

(print or type official's name)

Title

Signature

Please mail completed form to: Emerson, 8000 W. Florissant, P.O. Box 4100, Sta. #3621, St. Louis, MO 63136

Note: Emerson reserves the right to suspend, amend, or terminate this program at any time. The interpretation, application, and administration of the program shall be determined by Emerson. Its decisions will be final.