

## ExxonMobil Foundation Educational Matching Gift Program Guidelines

The ExxonMobil Foundation's Educational Matching Gift Program is intended to encourage support for accredited U.S. institutions of higher education by employees, retirees and surviving spouses. Eligible gifts up to a maximum of \$7,500 per donor, per calendar year, may be matched by the ExxonMobil Foundation at a 2-to-1 basis for current company employees and outside directors, and on a 1-to-1 basis for retirees, surviving spouses and former outside directors.

It is the responsibility of donors to read, understand and comply with the guidelines and restrictions below prior to requesting a matching gift. ExxonMobil's [Standards of Business Conduct](#) apply to all employees.

### General Guidelines

- The Educational Matching Gift Program is focused on supporting educational activities, not social or athletic programs and organizations. Contributions made to fraternities, sororities or other social clubs and affiliated alumni organizations; booster clubs; and athletic teams, clubs or facilities are not eligible for educational matching gifts.
- Donations must be made directly to the college or university, namely to the parent institution, not a sub-unit of the institution or separately incorporated group or organization acting as a conduit of funds to the institution. Donations made to general purpose foundations directly affiliated with some state-supported colleges and universities, however, are eligible.
- Donors wishing their personal gifts to be used for a specific educational purpose or particular sub-unit at an eligible institution such as an academic department, program or fund, should indicate such a preference in the relevant section of the online application form. Note, however, that the Foundation's matching gift to the institution is always provided unrestricted and not earmarked; the institution is only advised to use the Foundation's matching gift payment for educational purposes and it is not directed to apply the matching donation to specific entities within the institution.

- The Foundation's matching gift will be based on an actual donation, not a pledge or multi-year commitment made by the donor. Donors shall not enter into agreements or make commitments on behalf of the ExxonMobil Foundation.
- Each donor gift must be a minimum of \$50 payable by check, credit card or in publicly traded securities.
- Institutions receiving donations in association with the Educational Matching Gift Program have 90 days from the date a donation is received to certify and communicate its eligibility.

### Eligible Donors

- Regular employees of Exxon Mobil Corporation or its affiliates that operate in the U.S., including U.S. domestic employees on expatriate assignments;
- Retirees, and current and former outside directors of Exxon Mobil Corporation, Exxon Corporation or Mobil Corporation;
- Surviving spouses of deceased employees and retirees of the companies referenced above, as defined by ExxonMobil Human Resources; and
- Non-U.S.-payroll employees while on assignment in the U.S. with Exxon Mobil Corporation consolidated affiliates.

The donor must attest that he or she has a personal affiliation with the college or university, as a current or former attendee, or graduate of the college or university; the spouse or parent of an attendee or graduate; or has been or currently is a member of its faculty, administration or board of trustees. Personal affiliation does not extend to branch universities or facilities.

### Eligible Recipient Institutions

Accredited, degree-granting, not-for-profit colleges and universities, including business, law and other graduate schools, that are physically located in the U.S. and exempt from Federal taxes are eligible.

The United Negro College Fund (UNCF), American Indian College Fund (AICF) and Hispanic Scholarship Fund (HSF) are also eligible recipients for gifts, with no requirement for a donor's personal affiliation with those organizations. Contributions received by these funds are divided among member schools or programs for use as each deems appropriate. Donors may not designate these contributions for a specific college or university, program or particular type of student.

### **Gifts to Colleges and Universities**

To be eligible for a match, a donation to a college or university must meet all of the following conditions, in addition to the General Guidelines above:

- The gift must be a charitable contribution. Neither the donor nor any member of the donor's extended family or other designated person may receive a gift or benefit valued of more than \$50 value as a result of the donor's contribution or the ExxonMobil Foundation's matching gift.
- Donations may be made in association with a class fundraising campaign, but should be paid directly to the college, university or general-purpose foundation associated with a state-operated college or university, not to or through an alumni organization or other third party.
- The gift must be a personal contribution, not one made with funds received or collected from other individuals, groups or organizations for the purpose of making the gift.

### **Gifts to Support Scholarships at Colleges and Universities**

Gifts designated for scholarships are eligible only if:

- Participation in intercollegiate sports is not a criterion for eligibility;
- Neither the donor nor any of his or her extended family benefits from the scholarship;
- No one but faculty or administrators of the institution participate in selecting the recipients; and
- The terms and conditions of the award are at least as restrictive as those used by the institution in awarding scholarships out of its general scholarship fund.

### **Gifts Ineligible for ExxonMobil Foundation Matching**

Per, and in addition to, the restrictions outlined in the General Guidelines above, the Foundation will not match:

- Gifts used to support intercollegiate athletics, including gifts applied to athletic scholarships and gifts applied to physical facilities that are used for intercollegiate athletics;
- Gifts that in themselves or in combination with Foundation matching grants lead to the donor's receiving benefits of more than \$50 value;
- Gifts used to support non-educational facilities located at universities or colleges, such as hospitals, radio or television stations, or presidential libraries;
- Gifts to support fraternities, sororities, or other social clubs whose membership is not open to all university students;
- Gifts for the private benefit of specified individuals;
- Tuition or payments made in lieu of tuition;
- Gifts to provide scholarships or financial aid to individuals designated by the donor or selected by anyone other than official faculty or administrators of the institution;
- Class or other dues;
- Gifts made in lieu of pledges, tithes, or other financial commitments to a church or other non-eligible institution;
- Gifts of personal or real property (other than cash or securities);
- Bequests, charitable remainder trusts and other types of deferred gifts; or
- Gifts in the form of premiums on insurance under which the institution is a beneficiary.

## Gift Application and Certification Process

### **Process for Donors**

Applications to the ExxonMobil Foundation for an educational matching gift must be submitted online at [www.easymatch.com/exxonmobil](http://www.easymatch.com/exxonmobil) on or before December 31 of that calendar year. If an application is found to be ineligible, an email will be sent to the donor declining the application based on program guidelines and restrictions. Donors may check the status of a grant online at [www.easymatch.com/exxonmobil](http://www.easymatch.com/exxonmobil). If you need assistance, please call (877) 807-0204. In calculating the \$7,500 annual ceiling on donor's matching gift, the Foundation will assign each gift to the calendar year in which it was made.

During the application process, the donor will be asked to certify compliance with the program guidelines and eligibility to receive an ExxonMobil Foundation match. After an initial review for eligibility, the donor will be advised of receipt of their application and of the Foundation's intention to issue a matching grant.

The Foundation's matching gift payments are issued to colleges and universities during the spring of the subsequent year assuming all eligible matching gift applications are submitted on or before December 31.

### **Process for Eligible Recipient Institutions**

Once a donation is received, either electronically or by mail, please log into ExxonMobil's EasyMatch portal at [www.easymatch.com/ExxonMobil/agency](http://www.easymatch.com/ExxonMobil/agency) to review the terms and conditions of the Educational Matching Gift Program as outlined above and verify the donation. The EasyMatch agency portal is a secure website that provides Educational Matching Gift Program recipient institutions with the ability to review and certify contributions.

If your institution has previously used the EasyMatch portal, you will receive email communications at the address established on the agency portal advising that there are pending requests requiring verification. If the institution has not previously used the portal, it will receive a letter via U.S. Mail that provides login instructions.

Your institution must electronically certify the donation via the EasyMatch portal before the ExxonMobil Foundation can provide a matching gift.

## Program Administration

The ExxonMobil Foundation's matching gift program is reviewed regularly and may be changed, suspended, revoked or terminated at any time.

It is ExxonMobil's policy that employees and retirees avoid any real or potential conflict of interest between their own personal interests and those of the ExxonMobil Foundation. Any questions regarding potential conflicts should be directed to the employee's supervisor or the ExxonMobil Foundation.

As a reminder, ExxonMobil's [Standards of Business Conduct](#) apply to all employees. Non-compliance with program guidelines or falsification of information on an application may result in disciplinary action, up to and including termination of employment.

The interpretation, application and administration of the program shall be determined by the ExxonMobil Foundation, and decisions shall be final. The chairman or president of the Foundation, at his or her sole discretion, reserves the right to examine and exclude organizations, gifts and participants as he or she deems appropriate.

ExxonMobil reserves the right to audit institutional records and documents pertaining to this program and to request supporting donor documentation.

If a matching grant is, at any time, found to have been generated by an ineligible donor gift, the Foundation will expect the return of its grant funds.

The ExxonMobil Foundation reserves the right to suspend from the program any institution it believes has violated matching gift program guidelines.

Questions regarding the program should be directed to [exxonmobil@easymatch.com](mailto:exxonmobil@easymatch.com) or (877) 807-0204.