



Questions? Email us at matching_gifts@fmr.com or call 1-866-536-2824.

Fidelity Foundation Matching Gifts to Education Form

Part I: To be filled out by Fidelity Employee

Part II: To be filled out by Educational Institution

Employee Instructions:

- Complete and sign Part 1 of this form—one for each gift.
- Send this form and a copy of the *Program Guidelines* with your contribution to the recipient organization.
- Note: Gifts will not be matched if this form is submitted more than 12 months after the date of the gift.
- Review the *Program Guidelines* and note that organizations which are described as public charities under Section 509(a)(3) of the Internal Revenue Code ("supporting organizations") are not eligible for Matching Gift consideration.

Recipient Organization Instructions:

- Complete all fields, sign, and return to the address below.
- **Required:** Attach a copy of the donor's check, credit card receipt, or security gift details. *Note: A copy of the receipt sent to the employee is not an acceptable proof of payment.*
- If you have not received a gift from Fidelity Investments in the past year, please attach copies of:
 - Your **IRS Letter of Determination** certifying tax-exempt status, or (if parochial school) diocese directory listing **and**
 - Your **certificate of accreditation** (if an educational institution)

A. Employee Information

First Name		
Last Name		
Employee Badge ID Number REQUIRED	Phone Number	
A		
Home Address		
City	State/Province	ZIP/Postal Code

A. Educational Institution Information

Name of Educational Institution		
Federal Tax ID Number	Name of Accrediting Organization	
Address		
Address		
City	State/Province	ZIP/Postal Code
Phone Number	Extension	
Email Address		

B. Gift Information

Name of Educational Institution	
Amount of Gift \$50 minimum	Date of Gift MM DD YYYY
\$	

B. Gift Information

Tax-Deductible Amount of Gift \$50 minimum	Date Gift Received MM DD YYYY
\$	

C. Signature

By signing below, you:

- Attest that the information presented above is accurate and verify that you have read and understood the policies of the Fidelity Foundation Matching Gifts to Education program.
- Attest that this contribution was funded solely by you (or by your spouse from a joint account) and did not consist of funds contributed directly or indirectly by any other person.
- Attest that no goods or services were provided in exchange for any part of your gift.

C. Signature

By signing below, you:

- Attest that the information presented above is accurate.
- Attest that no goods or services were provided in exchange for any part of the gift.
- I have enclosed the certificate of accreditation, IRS Letter of Determination, and confirmation of the employee's donation. *If applicable. See instructions above.*

Employee Signature REQUIRED	Date MM DD YYYY
SIGN ▶	▶

Officer of Institution Signature REQUIRED	Date MM DD YYYY
SIGN ▶	▶

NOTE: Forms sent without the required information or documentation will NOT be processed. (485210.3.0)

Mail completed form and required attachments to:
Fidelity Foundation Matching Gifts to Education Program
P.O. Box 770001
Cincinnati, OH 45277-0052

OR
Fax to:
1-877-665-4274