
THE FLUOR FOUNDATION MATCHING GIFT PROGRAM FOR COLLEGES AND UNIVERSITIES

"The Fluor Foundation is pleased to offer a matching gift program to support academic programs at eligible universities, colleges, and technical schools. Individuals planning to enter the workforce today, now more than ever, require some form of postsecondary education or training. Together our support can assist the higher education system to maintain high standards for academic excellence and equitable access for all students."

J. Robert Fluor
President, The Fluor Foundation

MATCHING LIMITS

The Fluor Foundation will match \$1 for every \$1 an eligible donor contributes to an eligible educational institution as described below. The minimum employee gift amount matched is \$50, and the maximum total amount matched per employee each fiscal year (January - December) is \$5,000. A donor may contribute to one or more institutions. Contributions must be in the form of cash or securities.

ELIGIBLE DONORS

1. Salaried full-time and salaried part-time employees of Fluor and its subsidiaries. U.S.-based employees working outside the U.S. are also eligible.
 - a. Employees must have completed one year of service and be employed at the time the matching gift form is received by the Foundation.
 - b. Employees meeting the above requirements who are on a leave of absence also are eligible.
2. Members of the Board of Directors of Fluor Corporation.

ELIGIBLE EDUCATIONAL INSTITUTIONS

1. A public or private degree-granting university, two- or four-year college, graduate, professional, or technical school that is located in the U.S. or its territories, and is accredited by regional, national, professional, or specialized agencies recognized as accrediting bodies by the U.S. Secretary of Education, the Council for Higher Education (CHEA), or by the Council on Postsecondary Accreditation (COPA)/Commission on Recognition of Postsecondary Accreditation (CORPA). The institution also must be classified by the Internal Revenue Service as a tax-exempt institution to which contributions by an individual are deductible for federal income tax purposes.
2. An educational fund whose sole purpose is raising funds for its constituent members and whose members are eligible institutions as defined above (e.g., United Negro College Fund, Hispanic Association of Colleges and Universities, American Indian College Fund.)
3. A tax-exempt organization whose primary purpose is the collection of funds and issuance of academic scholarships for **post-secondary** education.

PROCEDURES

1. The donor must complete Part I and mail the entire form (pages 1, 2 and 3) to the recipient institution with the contribution. The donor must complete a matching gift form for each contribution.
2. The recipient institution must complete Part II and return the entire form to the Fluor Foundation in Aliso Viejo, CA, along with any required documentation noted on the application.
3. Upon receipt of certification from the educational institution, the Fluor Foundation will determine eligibility of the donor, institution and designation. A letter and a matching check then will be sent to the institution. The check will be designated as indicated in Part I by the donor. A letter also will be sent to the donor verifying that the Foundation has matched the contribution.

DISBURSEMENT SCHEDULE

- Matching gifts are processed twice yearly in May and December. Additional dates may be added based on volume.
- The Fluor Foundation will accept applications for matching gifts up to **90 days** from the date of the donor's gift.
- Matching gift forms received by the Fluor Foundation office **after December 10** will be processed and credited in the upcoming fiscal year.

GIFT RESTRICTIONS

Gifts must be actual contributions made, not pledged, by the eligible donor directly to an approved institution in cash or securities having a quoted market value. The program will match donations directed to the following:

1. General funds (e.g., annual alumni giving fund, parents' fund, building campaigns);
2. Academic programs and department support (e.g., school of engineering, student programs, faculty development, classroom/lab supplies);
3. Academic scholarships.

INELIGIBLE DESIGNATIONS (but not limited to)

- Athletic or recreational buildings/programs/scholarships;
- Tuition payments;
- Payment for tickets/benefit meals/publications;
- Alumni dues;
- Church organizations and tithes;
- University affiliated hospitals/arboretums/radio or television stations/museums/presidential libraries;
- Deferred giving;
- Fraternities or sororities.

STATEMENT

The Foundation reserves the right to determine whether any gift will be matched and is not obligated to fulfill an employee's pledge. Foundation trustees may periodically review and change program policies without prior notice or approve special matching gift designations.

The Fluor Foundation, established in 1952, serves as a philanthropic arm of Fluor Corporation. Funded by contributions from the Corporation, the Foundation responds to the needs, challenges and opportunities of our complex society by providing financial assistance to various non-profit organizations and educational institutions.



PART I – TO BE COMPLETED BY THE DONOR

Complete this part of the form and mail the entire form (pages 1, 2 and 3) to the designated educational institution with your contribution. Any part of this form left incomplete will be returned to the donor.

Date of check or securities transfer: _____ Type of Donation: Cash Securities Amount of contribution (minimum amount \$50): \$ _____

Payable to: _____

Designation: (e.g., annual alumni giving fund, school of engineering, etc.) _____

What benefits, if any, will you receive for this donation? (e.g., preferred event seating, parking privileges, special recognition, etc.) _____

SECURITIES (If applicable): Name: _____

Number of Units: _____ Date Transferred: _____ Value at close on transfer date: \$ _____

I hereby certify that this is a personal contribution and, in all respects, meets the eligibility requirements and gift restrictions of the Fluor Foundation Matching Gift Program. I hereby authorize the above named institution to verify this contribution and report it to the Fluor Foundation in order to qualify for a matching gift.

Signature: _____

Donor's name: _____ Personnel No.: _____

Home address: _____ Company: _____

Status: Employee Director Title: _____

Office/site location: _____ Daytime Telephone: _____

Email Address: _____

PART II – TO BE COMPLETED BY THE INSTITUTION

STATEMENT OF ACCEPTANCE

The Fluor Foundation reserves the right to seek additional information about the recipient institution and designation, and to request reimbursement or redirection of funds at any time if funds are used outside of its stated guidelines. Matching funds will be designated as indicated by the donor in Part I above.

INSTRUCTIONS

Complete this part of the form and (1) mail entire form, along with a copy of the IRS letter granting tax-exempt status, unless a letter has already been provided, and (2) send proof of securities transfer, if applicable.

Amount received (or securities value): \$ _____ Indicate ineligible amount (e.g., dues, tickets, subscriptions, etc.): \$ _____

Name of donor: _____ Date: _____

Name of institution: _____

Describe how the donor's contribution will be expended, or attach a detailed written document describing the designation: (e.g., annual alumni, school of engineering, parent's fund, etc.) _____

Describe any benefits issued to donor: (e.g., preferred event seating, parking privileges, special recognition) _____

Authorizing signature: _____ Print name and title: _____

Mailing address: _____

Name and telephone number of the matching gift contact person: _____ Date: _____

FORM WILL BE RETURNED IF ANY SPACES ARE BLANK

Additional information or questions about the Matching Gift Program should be addressed to:
The Fluor Foundation, Matching Gift Coordinator S2A, 3 Polaris Way, Aliso Viejo, CA 92698
949.349.7914