

# Follett Matching Gifts Program To Educational Institutions and Charitable Organizations



Follett Corporation will match gifts from a minimum of \$25 to a maximum aggregate of \$6,000 (as of April 1, 2009) per fiscal year per eligible donor (associate, retiree, shareholder). The maximum aggregate is based on combining the maximum allowable matches of \$3,000 for educational institutions and \$3,000 for charitable organizations per fiscal year per eligible donor. A matching gift will be based on payment actually completed and not on pledges or commitments for future payments. The matching gift from Follett is for the unrestricted use of the receiving institution or organization. However, the donor may specify that his or her contribution be used for a designated purpose or project. The donor must indicate this designation on the matching gift application form.

## Eligible Donors

Regular full time associates\* with at least one year of service, Follett retirees, and shareholders can make contributions at any time during the year and qualify for a matching contribution.

*(\*associate must be active on March 31st or September 30th respectively for Follett to match gift)*

## Eligible Institutions and Organizations

Matching contributions will **NOT** be made to any institution or organization that restricts membership by race, religion, ethnic background, age, or other limiting factors. In addition, eligible educational institutions and charitable organizations must be:

- Recognized by the United States Internal Revenue Service as tax-exempt under Section 501(c)(3) of the Internal Revenue Code or as an organization to which tax deductible contributions can be made as a registered charity with Revenue Canada Taxation
- Located in the United States or Canada

Eligible educational institutions include:

- Accredited institutions offering a 2-year or 4-year degree, such as universities, colleges, graduate schools, and technical institutions.
- Private elementary and secondary schools
- Alumni associations provided they are certified by the eligible educational institution with which they are affiliated
- Non-athletic scholarship funds provided they are administered by an eligible educational institution

Eligible charitable organizations generally fall into these four categories:

- **Cultural** including museums and arts councils
- **Health and welfare** including homeless shelters and hospitals
- **Environmental** organizations
- **Youth groups**

## Ineligible Gifts

Payments described below will **NOT** be eligible to receive matching contributions:

- Contributions to organizations or funds established to support athletic programs or athletic scholarships
- Payments that cover tuition, books, student fees, subscriptions, insurance premiums, or tickets, or any payment where the contributor receives any consideration
- Membership fees
- Dues payable to alumni or other groups
- Gifts to fraternities, sororities, or other campus organizations
- Gifts intended to fulfill a person's church-related pledges or other church-related financial commitments

- Contributions made jointly by several individuals, or on behalf of an ineligible participant.
- Gifts of property, goods or services
- Gifts made for bequests, dues, subscription or membership fees, insurance premiums, tuition payments or payments in lieu of tuition, books, raffles, auctions, tickets to events sponsored by or benefiting an educational institution
- Political action campaigns and election campaigns

In the event of a disagreement regarding eligibility, Follett Corporation Human Resources will make the final determination regarding whether or not a donation will be eligible for a match.

## Instructions

1. Complete and sign Section A on the reverse side of this Matching Gift Request Form.
2. Send the actual completed and signed form, along with your donation, to a qualifying educational institution or charitable organization.
3. The educational institution or charitable organization completes Section B and returns the form to:

Follett Corporation  
Matching Gifts Program  
3 Westbrook Corporate Center, Suite 200  
Westchester, IL 60154

After verification that the gift has been received by a qualifying organization in accordance with Follett program guidelines, a check will be forwarded by Follett Corporation to the institution as outlined below.

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Forms Received by:	Matching Gifts sent:
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February 1	March 31
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August 1	September 30
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A semi-annual statement will be sent to donors at the end of each cycle summarizing their donation(s).

## Administration

Follett Corporation reserves the right to suspend, revise, revoke or terminate this program at any time. The interpretation, application, provision and administration of this program shall be determined by Follett Corporation and its decision shall be final.

# Follett Matching Gifts Program Request Form



You may make as many copies of this form as you would like. You must, however, send the actual completed and signed form along with your check to a qualifying charity.

## Section A: To be completed by ASSOCIATE, RETIREE, OR SHAREHOLDER

Fill out Section A completely and send this form along with your donation to the educational institution or charitable organization of your choice.

\_\_\_\_\_ Date

\_\_\_\_\_ Name

\_\_\_\_\_ Home Address

\_\_\_\_\_ City State Zip

\_\_\_\_\_ Home Phone

\_\_\_\_\_ E-mail Address

### Status

- Associate     Retiree     Shareholder  
*Spouses and other relatives of associates are not eligible.*

### Division

- Corporate     FHEG     FSS     FINT

## Gift Data

\_\_\_\_\_ Name of Foundation  
 Please check one  Educational Institution     Charitable Organization

\_\_\_\_\_ Address

\_\_\_\_\_ Address

\_\_\_\_\_ City State Zip

\_\_\_\_\_ Phone

Date of Gift (month/day/year)      /   /

Amount of gift (\$25 minimum \$3000 maximum)    \$  ,    .

### Form of gift (cash gifts not eligible)

- Check
- Credit Card (include verification of charge)
- Online Donation (include confirmation/receipt of donation)
- Securities (include verification of securities: \_\_\_\_\_ number of shares of \_\_\_\_\_ stock)

I certify that this gift is solely for the use of the organization named and that neither I, nor any member of my family, nor any directed third party will benefit in any way from this gift. I further certify that the amount given is entirely my own and meets the qualifications of the program as specified in this form.

\_\_\_\_\_ Signature    \_\_\_\_\_ Date

## Section B: To be completed by Gift Recipient

I certify that the contribution described in Section A was received by the organization below. This is an accredited educational institution of charitable organization that has been determined tax-exempt under Section 501(c)(3) of the Internal Revenue Code, is not a private foundation, and is one to which contributions by individuals and corporations are deductible on their federal income tax returns.

**PLEASE READ CAREFULLY:** In order for this form to be processed, you must include a copy of the donor's check. If the gift is a security, made by credit card or online donation, a receipt documenting the gift must be included with the form.

You must enclose a copy of your federal 501(c)(3) tax-exempt determination letter, EIN number, and a copy of the donor's contribution and return them with this form to the address below.

**NOTE:** All Matching Gift requests an supporting documents must be received by Follett Corporation within 1 year of the gift date.

**Please type or print clearly in ink only.**

\_\_\_\_\_ EIN Number    \_\_\_\_\_ Date

\_\_\_\_\_ Contact Name

\_\_\_\_\_ Title

\_\_\_\_\_ Organization Name

\_\_\_\_\_ Address

\_\_\_\_\_ City State Zip

\_\_\_\_\_ Telephone    \_\_\_\_\_ Fax

\_\_\_\_\_ E-mail Address    \_\_\_\_\_ Web Address

\_\_\_\_\_ Gift Amount    \_\_\_\_\_ Tax Deductible Amount

**I confirm that the above gift was received and that this organization is tax-exempt under the U.S. Internal Revenue Code. I further confirm that no direct, tangible benefit will accrue to the donor, any member of his/her family, or to any directed third party as a result of this gift and that it will be used to support the primary objectives of the organization.**

\_\_\_\_\_ Authorized Signature    \_\_\_\_\_ Date

Please mail this Matching Gift request form and include each of the following:

- copy of federal 501(c)(3) tax-exempt determination letter
- EIN number
- verification of donor's contribution (i.e., copy of check, credit card receipt, online receipt or securities documentation)

to: Follett Corporation—Matching Gifts Program  
 3 Westbrook Corporate Center, Suite 200  
 Westchester, IL 60154

Questions? Contact the matching Gifts Coordinator: Phone 708-583-2000  
 Toll-free: 800-322-6223 Email: matchinggifts@follett.com