



Matching Gifts Program

The GE Foundation created the concept of a corporate matching gift program in 1954 to encourage and match gifts made by employees to educational institutions and community-based non-profit organizations. Since then, thousands of companies worldwide have adopted similar programs, contributing well over \$1 billion per year. Today, the GE Foundation Matching Gifts Program continues to serve as an important element of the Foundation's portfolio.

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GE PARTICIPANTS

Eligible participants are limited to:

Employees of the GE Company or a majority-owned affiliate on the date(s) the gift was made and registered.

Persons who have retired directly from the GE Company or a majority-owned affiliate.

A surviving spouse of an eligible retiree (as defined in item 2 above).

Directors and Directors emeriti of the GE Company.

NON-PROFIT RECIPIENTS

Eligible Recipient Organizations

Participating organizations must be:

Recognized by the United States I.R.S. as a 501(c)(3) public charity (excluding the organization types listed in the "Ineligible Recipient Organizations" section)

or

Accredited public or non-profit schools, school districts, colleges, and universities to which contributions are tax deductible under the Internal Revenue Code of the United States (excluding the organization types listed in the "Ineligible Recipient Organizations" section).

Organizations must confirm compliance with program criteria to access the Matching Gifts system and participate in the program.

Ineligible Recipient Organizations

The following are not eligible to participate:

United Ways (e.g. United Way of Metropolitan Atlanta, United Way of King County, etc.)

Political organizations

Organizations primarily promoting religious purposes or those requiring participants to be of a certain faith or to participate in programs or receive services.

Private foundations, donor advised funds, personal trusts.

Organizations that discriminate on the basis of a person's race, color, religion, national origin, sex (including pregnancy), sexual orientation, age, disability, veteran status or other characteristic protected by law.

Organizations that do not comply with the USA Patriot Act.

GIFTS

Eligible Gifts

Gifts must be a tax-deductible contribution of U.S. \$25 or more and must be paid directly by the GE donor to the eligible organization or institution (please note exceptions in "Ineligible Gifts" section). Any non-deductible portion of a gift will not be matched.

Gifts must be current contributions from the GE employee/retiree's own assets. Gifts must be made, not merely pledged. A matching gift

cannot be used to satisfy a personal pledge (e.g. a pledge of \$2,000 cannot be satisfied by \$1,000 from the donor and \$1,000 from the GE Foundation match).

Gifts may be made via cash, check, credit card or stock. Gifts may also be made by current payment from an entity such as a trust, private or family foundation, or donor advised fund if that entity has been funded solely by an eligible GE participant (note that gifts made to such an entity cannot be matched).

An individual GE employee/retiree will be matched up to \$50,000 in a calendar year.

Gifts made within the calendar year must be registered by the donor by the following January 31. The recipient organization or institution must confirm receipt of such gifts within 12 months of the donor registering the gift.

Ineligible Gifts

The GE Foundation will not match the following:

Charitable contributions made as part of a United Way campaign and/or made via payroll deduction.

Charitable contributions supporting activities for religious or political purposes.

Charitable contributions made as bequests or through entities such as charitable remainder or lead trusts or charitable gift annuities.

Real estate or in-kind charitable contributions.

Contributions, or portions thereof, that are not tax-deductible.

"Group gifts" - each GE donor must register his/her own contribution for matching. A GE donor may not register contributions made by another individual.

GIFT MATCHING PROCESS

Register your Gift with the GE Foundation Matching Gifts Center

Go to the GE Foundation Matching Gifts website (www.gefoundation.com/matchinggifts).

Click on the "GE Participants" button to log in using your GE SSO I.D. and password. You will need to enter the recipient organization name, amount, type and date of your gift.

You will have the ability to print a confirmation of your gift registration.

Gifts made within the calendar year must be registered by the donor by the following January 31. Note that gifts may also be registered by phone with the Matching Gifts Customer Support Center (1-800-305-0669). Questions may be directed to the Customer Support Center at this same number or by email to gesupport@cybergrants.com.

Gift Confirmation

The recipient organization/institution must confirm receipt of gifts within 12 months of the donor registering the gift. Gifts as reported by eligible GE participants will be made available to each recipient organization/institution for review. Note that the recipient organization/institution must also confirm compliance with eligibility criteria.

Once confirmed by the organization and subsequently approved by the GE Foundation, a gift will be recorded as eligible for the match.

Matching Gift Distribution

GE Foundation matching gift checks will be sent directly to the recipient organization or institution.

Payments will be made on a quarterly basis.

ADMINISTRATIVE CONDITIONS

The GE Foundation Matching Gifts Program is not part of the GE employee/retiree benefits program, but rather is offered as a public service by the GE Foundation, the charitable foundation established by GE. The GE Foundation determines all aspects of the program including participant and recipient eligibility, and may amend or terminate the program at any time.