

E. & J. GALLO WINERY

MATCHING GIFT PROGRAM

The E. & J. Gallo Winery **Matching Gift Program** is an important part of Gallo's corporate giving. Through the program, E. & J. Gallo Winery matches gifts up to \$5,000 per employee per year. The program allows employees to direct our corporate giving by providing them an opportunity to help their favorite charities while strengthening the communities where we live and work.

The **Matching Gift Program** doubles the amount of money employees give to eligible organizations. When you give \$50 or more to a qualified organization, Gallo will give the same amount, dollar for dollar, up to the \$5,000 annual limit.

GUIDELINES

Matching Amounts

- The E. & J. Gallo Winery will gift match an annual maximum of \$5,000, per employee.
- Maximums are calculated on a calendar year basis— gifts made in a calendar year will apply toward your matching gift maximum for that same year.
- The minimum cash gift amount per match request is \$50 (this could consist of a single gift of \$50 or multiple gifts totaling \$50 submitted on the same application).

Matching Dates

- Forms must be submitted and received within 12 months from the date the gift was made.
- The Matching Gifts are paid quarterly – in March, June, September, and December.

Matching Eligibility

Applications for matching funds will be reviewed under the following criteria:

- Financial gifts must be personal and tax-deductible - paid and not simply pledged.
- All U.S.-based employees are eligible to participate in the E. & J. Gallo Winery Matching Gift Program after thirty (30) days of employment.
- Eligible organizations must be located within the United States and recognized by the IRS under Section 501(c)(3) of the U.S. Internal Revenue Code. Eligible organizations include, but are not limited to, civic organizations, arts and culture organizations, health and human service agencies, environmental organizations, and higher education institutions or programs with 501(c)(3) status.
- **Types of Organizations NOT Eligible for Matching Gifts:**
 - Individual causes (e.g. creating a fund to support cancer related medical bills)
 - Corporate business partners or customers
 - Government agencies to include Political Action Committees and Lobbying
 - Athletic or Booster school programs, individual schools or band programs
 - Organizations that conflict with Corporate Values such as Diversity and Sustainability

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- **Types of Gifts NOT Eligible:**

- Pledges, tuition, or tithes to houses of worship (e.g. churches, synagogues, etc.)
- Contributions to religiously affiliated programs or organizations whose principal purpose is propagating a particular religious faith, creed, or doctrine (e.g. missions, religious orders)
- Dues and subscription fees
- Deferred gifts (annuities, charitable remainder trusts, etc.), bequests, and insurance premiums that name the organization as a beneficiary
- Tuition fees, loan repayments, and payments in lieu of tuition
- Grouped and pooled donations (including contributions made by groups of employees or other persons and claimed as one gift from a single eligible donor)

INSTRUCTIONS FOR USING THIS FORM

Employees can find an electronic version of this form on the HR page of the [Grapevine Portal](#) and on the [Employee Self Service \(ESS\) Kiosks](#) located in the various operations areas of the Winery.

- Complete Part A.
- Send the form to the organization you are making the gift to.
- The organization completes Part B, verifying your gift, and mails the form to the Program Administrator (the address is listed in Part B).
- The Program Administrator verifies your eligibility, and the eligibility of the organization to which you sent your gift.
- Separate forms are required for each financial gift.

NOTE TO EMPLOYEE

E. & J. Gallo Winery may suspend, amend or discontinue the program at any time without advance notice and reserves the right to determine whether a grant shall be made based on eligibility. If an ineligible person or organization generates a grant through the Matching Gifts Program, the Winery will expect return of the grant from the organization. A grant from E. & J. Gallo Winery does not constitute an endorsement by E. & J. Gallo Winery.

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MATCHING GIFT PROGRAM REQUEST FORM

Section A - Donor

Please complete this section and send it, with your contribution, to the recipient organization. The recipient organization will complete Section B.

Name _____

Employee Address Book Number _____

Address _____ City/State/ZIP _____

Phone Number _____ Email Address _____

Select the type of gift(s) for which you are requesting Matching Gift and complete the information in the corresponding box.

● Monetary Gifts

Date of Gift _____ Amount of Gift \$ _____

Type of Gift (check one) Amount to Be Matched \$ _____

Cash/Check Credit Card

Certification Statement

I certify that the information I have provided is complete and correct to the best of my knowledge, and that my gift complies with the provisions of the program set forth on this form. I understand that only the tax-deductible portion of my donation is eligible for matching by the E. & J. Gallo Winery Matching Gift Program.

Donor Signature _____ Date _____

Section B – Recipient Organization

Please complete the following information and send to:

E. & J. Gallo Winery Matching Gift Program

600 Yosemite Blvd
Modesto, CA 95354
(209) 341-7936

Organization Name _____ 501(C)3 Tax Identification Number _____

Mailing Address _____ City/State/ZIP _____

Phone _____ Fax _____

Email Address _____ Website Address _____

Gift Amount _____ Tax Deductible Gift Amount _____

Does your organization accept credit card for payment? Yes No

Certification Statement I hereby certify that: 1) the receipt of the gift described herein, 2) the eligibility of this organization, 3) and the use of these funds conform to the E. & J. Gallo Winery Matching Gift Program guidelines.

Name of Organization Representative _____ Title _____

Signature _____ Date _____

E. & J. Gallo Winery reserves the right, at any time, to modify or discontinue this program. The interpretation, application, and administration of the provisions of this program shall be determined solely by E. & J. Gallo Winery, and its decisions shall be final.