

EMPLOYEE MATCHING GIFT PROGRAM

Guidelines

The Bill & Melinda Gates Foundation will match employee contributions to eligible charitable organizations at a rate of three dollars for every one dollar contributed up to a maximum match of \$30,000 per year (i.e., for employee contributions up to a maximum of \$10,000 per year). The foundation will match gifts of cash, personal checks, and credit cards on a quarterly basis.

Eligible organizations are recognized by the Internal Revenue Service as tax-exempt and designated as public charities under section 501(c)(3) of the Internal Revenue Code (IRC) or are federal, state or local government units as provided by sections 170(b)(1)(A)(v) and 170(c)(1) of the IRC. Examples of eligible organizations include accredited colleges and universities, private and public elementary and secondary schools, public libraries, health and human service agencies, animal welfare organizations and environmental organizations.

The foundation will not match contributions to religious institutions for exclusively religious purposes; contributions to fraternal or political organizations; payment of membership fees for which benefits are received including memberships in athletic clubs, alumni associations, zoos, parks, museums, and other organizations that primarily benefit the donor; payments that cover the costs of services, tuition, books and student fees; gifts made to donor advised funds or pooled gifts; or payments for raffle tickets, benefits, meals, auctions at (or for) fundraising events, except to the extent the donor did not receive a benefit in exchange for his or her contribution.

Application Process

To request a matching gift from the Bill & Melinda Gates Foundation Matching Gift Program, **eligible employees should complete "Part A"** of this form, sign it and mail it with his or her contribution to the eligible, charitable organization.

An authorized officer at the recipient organization should complete "Part B", read and sign the Matching Gift Agreement and mail the **original** to the address below. *Facsimiles or copies of the signed form cannot be accepted.*

**Bill & Melinda Gates Foundation Employee
Matching Gift Program
P.O. Box 3540
Princeton, NJ 08543-3540**

Part A – To be completed by the employee.

Please print all responses.

NAME

HOME ADDRESS

CITY/STATE/ZIP

NAME OF RECIPIENT ORGANIZATION

GIFT DATE (MONTH/DAY/YEAR)

\$
AMOUNT OF GIFT

PROMOTIONAL ITEM(S) RECEIVED (KEYCHAIN, MUG, TEE-SHIRT, ETC)

EMPLOYEE DONATION AGREEMENT

I hereby certify that the above donation is entirely my personal contribution and is not, in whole or part, the gift of another individual/s. I also certify that all information is accurate. I have read and understood the guidelines of the Bill & Melinda Gates Foundation Matching Gift Program; and my contribution is eligible for a matching gift in accordance with the Employee Matching Gift Program Guidelines.

EMPLOYEE'S SIGNATURE

DATE

Please include a copy of the IRS determination letter stating that the organization is tax-exempt under Internal Revenue Code Section 501(c)(3) and classified as a public charity under Section 509 (a) (1), (2) or (3). By submitting this IRS determination letter, the organization acknowledges that there has been no change in its tax-exempt status or classification as a public charity.

Revision date 5/04/05

Part B – To be completed by an authorized officer of the charitable recipient organization. Please print all responses.

FEDERAL EMPLOYER IDENTIFICATION NUMBER (EIN)

CHARITABLE AMOUNT OF GIFT (PLEASE SUBTRACT THE VALUE OF ANY PROMOTIONAL ITEMS RECEIVED BY DONOR)

LEGAL NAME OF ORGANIZATION

ADDRESS

CITY/STATE/ZIP

CONTACT PERSON / TITLE

TELEPHONE

EMAIL ADDRESS/WEB SITE

MATCHING GIFT AGREEMENT

I hereby verify receipt of the contribution described herein and certify that the donation represents the charitable amount of the contribution and does not include any material benefit received by the donor. I confirm that the gift will be recorded as a matching gift in any publications and not as a grant from the Bill & Melinda Gates Foundation. I further confirm that the gift will not be (a) used to attempt to influence legislation or the outcome of any specific public election or to directly or indirectly carry on any voter registration drives, (b) used to support any person or organization involved in terrorist or money laundering activities, or (c) earmarked for the benefit of a particular individual. I also certify that all information provided in this form and otherwise in connection with this request is accurate and that I am an authorized officer of the recipient organization.

NAME

TITLE

Signature

Date