



## **GENEX Matching Gifts Guidelines**

GENEX Services, Inc. is committed to supporting the philanthropic efforts of our employees. The GENEX Matching Gifts Program will match eligible gifts from a minimum of \$50 to an aggregate maximum gift of \$5,000.00 per employee, per calendar year.

### **Eligible Participants:**

- The GENEX Matching Gifts Program is available to full-time, 40 hour/week employees.

### **Eligible Organizations:**

- Donations to eligible organizations will be matched on a dollar-for-dollar basis.
- To be eligible, an organization must qualify as tax-exempt as defined by the Internal Revenue Service of the United States Treasury Department and be consistent with the mission of our Matching Gifts Program.
- Churches are not eligible.
- The United Way is not eligible for matching gifts through this program.
- The company will provide matching gifts on a \$1 for-\$1 basis only to accredited colleges, universities, graduate schools, secondary and elementary schools within the United States and Canada.

### **Qualifying Gifts:**

- The company will match only unrestricted gifts that support the general endeavors of the qualifying institutions.
- The contributions must be a personal gift, made by an individual, and actually paid, not merely pledged.

### **Application Process:**

- Matching Gift applications may be obtained through **Touchpoint**.
- Complete a separate application for each donation.
- All applications must be accompanied by proof of the donation, a photocopy of written verification from the recipient organization, or a receipt signed by an authorized representative of the organization.
- Once an application and verification are received, a check will be sent to the organization, and a memo will be sent to the employee confirming the match.
- Incomplete applications will be returned to the employee.
- Matching gift checks are processed at the end of each month.
- Completed applications should be sent by the qualifying institution to ...

**GENEX Matching Gifts Program  
GENEX Services, Inc.  
440 East Swedesford Road, Suite 1000  
Wayne, PA 19087**

### **GENEX will not match funds to:**

- Association, alumni dues or alumni activities
- Athletics and extracurricular activities
- Tuition or related costs
- Membership fees
- Expenses incurred by the employee

GENEX reserves the right to change or discontinue the Matching Gifts programs. However, such action will not adversely affect cash gifts made or grant requests submitted prior to the date of change or discontinuance.

Additionally, the company shall determine the application, administration, and the interpretation of the provisions of the programs and its decision shall be final.