

# Glenmede Trust Company Matching Gift Program Registration Form

## About the Matching Gifts Program

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The Glenmede Matching Gifts Program was established as an employee benefit to help you increase the impact of your charitable contributions. The process for applying for a matching gift is simple and straightforward. This overview should answer your questions regarding eligibility and application, however if you need additional information please contact Alissa Omlor at 215-419-6703. As an organization founded by philanthropists, we recognize the importance of personal giving and hope that you will take advantage of this program to provide further support for the organizations of your choice.

## Questions and Answers

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- **Who is eligible to participate?** All regular full and part time benefit eligible employees and directors of The Glenmede Corporation, The Glenmede Trust Company N.A. can participate in the Matching Gift Program.
- **What is the match?** For every donation of at least \$25 to an eligible organization, the corporation will match your contribution on a 1:1 basis, up to a total of \$1,000 per calendar year.
- **Which organizations are eligible for a matching gift?** All non-profit, tax exempt organizations covered under Section 501(c)(3) of the internal Revenue Service Code, with the exception of public policy organizations, religious institutions, and political campaigns. Also, gifts to the United Way of Southeastern Pennsylvania will not be matched under this program because Glenmede matches employee's pledges under a separate program. If you have any questions whether an organization is eligible for a matching gift, please contact Alissa Omlor.
- **How often can I use the Match?** You may use the match whenever you make a contribution of \$25 or more to an eligible organization, up to \$1,000 per calendar year.
- **When are matching gifts paid?** Matching gifts will be paid four times a year: January, April, July, and October. Organizations may send in their applications throughout the year.
- **What type of contribution may I make?** Contributions may be made in cash, check, or securities (quoted market value necessary). With regard to securities, the amount of the match will equal the established value of the securities on the date of the contribution. Gifts must actually be paid, not just pledged in order to qualify.
- **Are there any restrictions?** The following types of contributions are not eligible for match under this plan:
  - Fees for service
  - Tuition reimbursement of any kind or gifts that reduce tuition
  - Life income trust arrangements
  - Insurance premium payments
  - Subscription fees for publications or tickets to events
  - Payments for "benefit meals" at fund- raising events
  - Gifts of real or personal property
  - Donations to private operating foundations
  - Donations to organizations that discriminate on basis of race, sex, color, and/or creed.

# Glenmede Trust Company Matching Gift Program Registration Form

## PART A: DONOR

1. Complete Part A of this form. A separate form should be completed for each gift. Please print/type
2. Send the form and a copy of the attached program guidelines with your contribution to the recipient organization

Donor Name \_\_\_\_\_

Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_  
Gift Date Gift Amount Amount to be Matched

Donation to (Organization Name) \_\_\_\_\_ Chapter Name/Program Designation (if any) \_\_\_\_\_

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

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## PART B: RECIPIENT ORGANIZATION:

1. Complete PART B of this form. **Please enclose a copy of your Internal Revenue Service 501(c)(3) determination letter and a brief description of your organization's primary purpose.**
2. Forward form to: The Glenmede Trust Company  
Matching Gifts Program  
1650 Market Street, Suite 1200  
Philadelphia, PA 19103  
Attn: Alissa Omlor

Name of Officer \_\_\_\_\_ Title \_\_\_\_\_

Name of Organization (Use only the name reflected on IRS Form 501(c)(3)) \_\_\_\_\_ Fed Tax ID # \_\_\_\_\_

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

(\_\_\_\_\_) (\_\_\_\_\_) \_\_\_\_\_  
Telephone Fax Web address

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ \$ \_\_\_\_\_  
Date Gift Received Amount Received

As an authorized officer of this organization, I certify that the gift described above was received and processed.

- Form 501(c)(3) attached
- Brief description of your organization's primary purpose attached

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