Employee Matching Gift Program Form

Part A – Employee Section

Complete Part A and send with your gift to the recipient organization.

Employee Name:	
Employee Home Address:	

Gift Information:

Organization Name:	
Date of Gift:	
My gift is in the amount of:	

I hereby certify that I have read the guidelines of the Gradian Health Systems Employee Matching Gift Program and to the best of my knowledge, this organization and gift falls within those guidelines.

Employee Signature:	Date:

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Part B - Recipient Organization Section

To be completed by the recipient organization. First-time applicants please include IRS determination letter recognizing tax exemption status.

This is to certify that a tax deductible gift of $_______________ was received on ___________________________
(Date)

from ____
(Name of Gradian Employee Donor)

I further confirm that we are a nonprofit, tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code. Any matching funds received from Gradian Health will be designated for the same purpose as the employee's original contribution. No goods or services have been or will be given to Gradian Health in exchange for this contribution.

Signature: _____________________________________ Date: Print Name:

Title:	
Phone Number & E-mail:	
Recipient Organization Name:	
Street Address, City/State/Zip:	
***Federal Employer Identification Number** (*must be provided):	

SEE NEXT PAGE FOR DETAILS ON WHERE TO RETURN FORM.

Please **email** or **mail** completed form to:

Gradian Health Systems
Attn: Moraa Gekonge
915 Broadway, Suite 1001
New York, New York 10010
Phone: (212) 537-0310
Email: billing@gradianhealth.org

*First-time applicants please include IRS determination letter recognizing tax exemption status.

Employee Matching Gift Program Guidelines

Gradian Health System's Employee Matching Gift Program was established to support the charitable interests of the staff and to recognize personal philanthropy. The Employee Matching Gift Program provides a 2:1 match by Gradian for personal contributions made by its employees to eligible nonprofit organizations.

Eligible Organizations

Eligible organizations include charitable nonprofit organizations, with the exception of private foundations, **that are recognized as a tax-exempt public charity by the U.S. Internal Revenue Service under section 501(c)(3) of the Internal Revenue Code.**

Gradian Health will match contributions to tax-exempt charitable organizations with the exception of contributions to churches or religious organizations for unrestricted or doctrinal purposes. Contributions to religious organizations must be for nonreligious purposes (e.g. soup kitchens, day care, low-income housing, shelters, community development) to be eligible.

Eligible Contributions

Gradian Health will match contributions (cash, check or credit card) made directly to an eligible organization. The use of matching gifts to fulfill personal obligations such as pledges is not permitted. Donations must be purely charitable, with the donor receiving no benefit or gift as a result of the contributions. Any payment for which the donor receives a specific benefit in return must be reduced by the fair market value of the benefit, to determine the gift portion of the payment. The Gradian Health gift will match that portion of an employee's donation that the recipient organization represents to be fully tax- deductible. Charitable organizations generally indicate on solicitation materials the fair market value of any goods or services offered in exchange for the contribution.

Limitations

Gradian Health will match donations on either a 2:1 or 1:1 basis, depending on the employees' preference. Gradian will match up to a $5,000 maximum for each employee per calendar year. The minimum eligible for an individual matching gift is $50.

Matching Gift Forms must be received by Gradian **within six months** of the date the employee made the gift in order for it to be eligible for matching.

Process

1. Employee completes Part A of the Matching Gift Form and sends the form, with the donation, to the eligible recipient organization.
2. The recipient organization completes Part B of the Matching Gift Form verifying that the financial gift was received and returns the form, along with proof of their 501(c)(3) status, to Gradian Health. Employee must submit a copy of the receipt. (Online receipts are sufficient with appropriate documentation.)
3. Gradian will review the Matching Gift Form and, following approval, checks will be sent directly to the qualifying organization. The employee will then receive a copy of their processed Matching Gift Form.
4. Matching Gift contributions will be processed on a monthly basis by the 30th of each month. Matching Gift Forms must be received by the 15th of the month in order to be processed by the 30th of that month. If received after the 15th, they will be processed the following month.

Frequently Asked Questions (FAQ)

1. I usually give to the XYZ Foundation. Why are private foundations excluded?
   We have excluded giving to private foundation because of IRS regulations. If the XYZ foundation is a 501 (c)(3) public charity, rather than a private foundation, it is eligible for a matching gift.

2. What about matching funds raised for community fundraisers (e.g. bake sales) or my participation in walk-a-thons or charitable races and contests?
   While we acknowledge your participation in community fundraising events, only the amount of a gift made by you, as an individual, is eligible for matching. The contributions of others do not qualify for matching by the Foundation.

3. Are in-kind gifts of property, stocks, insurance premiums, etc., eligible for a match?
   No. Only gifts of cash, check and credit card are eligible.

4. Does the Matching Program apply equally to part time and full time staff?
   Yes, all current staff of Gradian Health are eligible to participate equally with the same maximum.

5. Can gifts be made with pre-tax dollars or through employee payroll deductions?
   No, gifts cannot be made with pre-tax dollars of through employee payroll deductions.

6. Are contributions made by my family members eligible for the match?
   No, only gifts made by employees of Gradian Health are eligible for a match.

7. What about gifts I already made during the eligible period? I didn't include the matching gift form.
   The form is available in Gradian's DropBox in the Administrative > HR Folder. You can print the form, and send it to the organization for processing as long as the gift was made within the time limits outlined.

8. Is there a maximum number of gifts I can make to organizations? Is there a limit on the number of organizations I give to under the Matching Program?
   Gifts of $50 and above will be matched. As long as you do not exceed the $5,000 maximum contribution for one year there are no limitations on the number of gifts. Larger gifts can have greater impact. (Larger gifts also limit the number of administrative transactions processed). You may make one gift of $5000 or many small gifts.

9. What if I choose not to participate this year? Can I participate next year?
   Yes, participation in the Employee Matching Gift Program is entirely voluntary. There is no requirement to participate, and you may participate at any level during any year, regardless of what you do in any previous years. However, the matching contribution is limited to the maximum per calendar year and is not carried over to subsequent years.

10. What if I have more questions or I am not sure of qualifying organizations?
    Questions about administration of the Gradian Health Matching Gift Program can be addressed to Moraa Gekonge by email: billing@gradianhealth.org.