



## Matching Gifts Program Request Form

### Donor Instructions:

- Complete Part 1 of this form - one for each gift. *Please print or type.*
- Send the form and a copy of the program guidelines with your contribution to the recipient organization, or, employee donor sends check to matching gift company, authorized company officer adds matching gift check and forwards both to the recipient institution.

### Recipient Organization Instructions:

- Verify receipt of gift.
- Complete Part 2 of this form. *Please print or type.*
- If this is your first matching gift request to the **HEP Development Matching Gifts Program**, please enclose a copy of your Internal Revenue Service 501(c)3 IRS determination letter and a brief description of your organization's primary mission statement or purpose.
- Forward form to the address printed below.

### PART 1 - DONOR SECTION

DONOR NAME

HOME ADDRESS

CITY/STATE/ZIP

BUSINESS TELEPHONE, INCLUDING AREA CODE

E-MAIL ADDRESS

EXACT DATE OF GIFT

\$ \_\_\_\_\_ \$ \_\_\_\_\_  
AMOUNT OF GIFT (MIN \$25)                      AMOUNT TO BE MATCHED (MIN \$25)

Type of gift: Please check one:

Check     Credit Card

NAME OF ORGANIZATION

ORGANIZATION CITY, STATE

RESTRICTION OR PURPOSE (IF ANY)

I certify that neither my family nor I will derive any direct or indirect financial or material benefit from this contribution. I authorize the above-named recipient organization to report this gift to HEP for the purpose of applying for a matching gift. I certify that I (i) have not been and will not be reimbursed by anyone for this contribution, (ii) have read and understood the guidelines of the HEP Development Matching Gifts Program and that my gift complies with the provisions of the Program and (iii) have given my gift voluntarily and that it does not represent a fee for a service or benefit. I acknowledge that any misrepresentation by me of the statements made herein will forfeit my rights to any matching contributions and, in addition, may result in disciplinary action and/or violation of law.

SIGNATURE OF EMPLOYEE \_\_\_\_\_ DATE \_\_\_\_\_

### PART 2 - RECIPIENT ORGANIZATION SECTION

EMPLOYER IDENTIFICATION NUMBER (EIN)

ORGANIZATION NAME

ADDRESS

CITY/STATE/ZIP

TELEPHONE, INCLUDING AREA CODE                      FAX, INCLUDING AREA CODE

E-MAIL                      WEBSITE ADDRESSES (IF ANY)

DATE GIFT RECEIVED

\$ \_\_\_\_\_ \$ \_\_\_\_\_  
AMOUNT OF GIFT                      TAX DEDUCTIBLE GIFT AMOUNT

I hereby certify that this organization/program meets the eligibility requirements of the HEP Development Matching Gifts Program, and that neither the donor nor HEP will derive any personal material benefit from this gift or match.

AUTHORIZED OFFICER'S NAME (PLEASE PRINT)

TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZED OFFICER \_\_\_\_\_ DATE \_\_\_\_\_

MAIL COMPLETED FORM AND ANY REQUIRED ENCLOSURES TO:

HEP Matching Gift Program  
105 Loudoun Street, SW, #1  
Leesburg, VA 20175  
Phone: 1-703-669-5602; Fax: 703-669-5604  
Attention: Marianna Funk  
E-mail: [mfunk@hepdata.com](mailto:mfunk@hepdata.com)  
Website: [www.hepdata.com](http://www.hepdata.com)

## HEP Development Matching Gift Program

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The HEP Development Matching Gifts Program will match employee contributions at a 4:1 match. The minimum amount is \$25 with a match of \$100 and the maximum amount is \$250 with a match of \$1,000 per year per employee.

Employees may request that HEP match contributions associated with:

1. Education: Degree- Granting Colleges, universities, junior colleges, graduate schools, technical schools, seminaries, all accredited public and private: preschools, kindergartens, elementary schools, middle/junior high schools, secondary, high schools, independent college funds, educational services, and special education schools.
2. Health Services, Hospitals and Medical Research: All Health care services including non-profit organizations whose primary purpose is to provide health care services in the prevention or treatment of diseases/disorders, all healthcare organizations with the 501(c)3 designation. Hospitals - non-profit voluntary hospitals accredited by the Joint Council on Accreditation of Hospitals. Medical Research - non-profit organizations whose primary purpose is to conduct medical research, single disease organizations, hospices, hospitals, organizations for the treatment of special children and organizations specializing in the treatment of mental illness.
3. Humanitarian Organizations: All organizations that provide relief to victims of disasters, help people prevent, prepare for, and respond to emergencies; organizations that provide support to their communities benefiting the needs of the people including soup kitchens, food banks, youth organizations, and orphanages. Organizations that support the treatment of animals such as humane societies, animal shelters and animal adoption agencies.
4. Arts and Culture: Non-profit arts/cultural organizations primarily focused on activities that are open to and operated for the benefit of the general public, including but not limited to performing arts, museums, libraries, public

radio and TV associated with a college or University or independent.

5. Environmental/Conservation: Organizations that support and improve the environment and the conservation of the planet through programs such as but not limited to saving the rainforests and prevention of pollution in our waters and land.
6. Volunteer Program: Qualified employee may volunteer for any 501(c) non-profit organization in exchange for a cash match of \$250.00. Minimum hours are 25 hours per year. Evidence of participation in the form of a letter from the organization is accepted.
7. Religious Organizations: All religious Organizations are eligible that do not discriminate against other groups and therefore are open to all people.
8. Professional Societies/Associations including associations and groups such as USA Cycling, The US Olympic Team are all eligible.

All U.S. requests must be for organizations that are recognized by the IRS as 501(c) 3 tax-exempt organizations.

There are no current limitations on organizations that we will match to. Gifts can be designated to a department of the school including athletic programs, scholarships and building funds.

Contact:

HEP Matching Gift Program  
105 Loudoun Street, SW, #1  
Leesburg, VA 20175  
Phone: 703-669-5602; Fax: 703-669-5604  
Attention: Marianna Funk  
E-mail: [mfunk@hepdata.com](mailto:mfunk@hepdata.com)  
Website: [www.hepdata.com](http://www.hepdata.com)