

The H & R Block Foundation Matching Gift Program

Instructions for Donor:

- Complete Part 1 of this fillable form
- Mail this form, along with your gift, directly to the educational institution

Part 1 – Donor Section

Name

Employee ID Daytime Phone Number

Work Street Address

City State/Province Zip

E-mail Address

I prefer that my gift be restricted to:

I prefer that my gift my Unrestricted.

I hereby affirm that this gift has been made in the amount described above, and authorize the recipient to report this gift to the Foundation's Matching Gift Program

Signature of Associate Date

I acknowledge that I am a regular full-time employee of:

Tax Services

Includes: Digital Tax Solutions and Field offices

Corporate

Includes: HRB Management, Inc.

Mail this form, along with your gift, directly to the educational institution

Instructions for Organization:

- Verify the gift and complete Part 2 of the form
- Mail this form back to The H&R Block Foundation

Part 2 – Educational Institution Section

Organization Name

Employer Identification Number

Street Address

City State/Province Zip

School Accreditation

Amount of Gift

Date of Gift

Tax Deductible Amount

I hereby confirm that (i) the recipient organization has received the gift in the form and amount described above, and (ii), the above information concerning its status as an educational institution is true and correct. In addition, the Internal Revenue Service has recognized this institution as either an organization to which contributions are tax deductible or as a registered charity under Canada's Income Tax Act determined in good faith by The H&R Block Foundation to be an organization described in Internal Revenue Code sections 501(c)(3) or 509 (a)(1), (2), or (3) in anticipation of receiving The H & R Block Foundation gift. I further certify that no goods or services will be provided to The H&R Block Foundation in consideration of the matching gift.

Signature of Officer of the Organization

Officer's Name and Title

Date

Recipient Organization should mail completed form and copy of organization's 501(c)(3) tax exempt ruling to:

**The H & R Block Foundation
One H&R Block Way
Kansas City, MO 64105**

For more information contact:

**The H & R Block Foundation
(816) 854-4361
foundation@hrblock.com**

For more information go to www.hrblockfoundation.org

The H & R Block Foundation Matching Gift Program

PROGRAM OVERVIEW

H&R Block, Inc. strongly believes in civic involvement and corporate responsibility. One of the ways this commitment is demonstrated is through The H & R Block Foundation Matching Gift Program. The Matching Gift Program gives eligible associates of H&R Block subsidiaries an opportunity to determine how Foundation funds are allocated and allows associates to make significantly larger charitable contributions to educational institutions.

WHO MAY PARTICIPATE? Your charitable contributions may be eligible for matching if you are:

- A regular full-time employee* of H&R Block Services and its direct and indirect subsidiaries, HRB Management, Inc., and Block Financial Corporation;

** A regular full-time employee of H&R Block is an associate who works five days a week, eight hours per day on a non-seasonal continuing basis.*

HOW DO I PARTICIPATE IN THE PROGRAM? Complete and sign Section 1 of the Matching Gift form. Send it, along with your gift, to the eligible educational organization you have chosen to receive your gift. The organization must complete and sign Section 2 of the form to confirm its eligibility and receipt of your gift and forward it to the Foundation. The H & R Block Foundation will send a matching gift to each eligible organization and notify you that your gift has been matched. The deadline for submission of previous years gifts is January 31 of the next year.

WHAT GIFTS ARE ELIGIBLE FOR MATCHING FUNDS? Gifts must be paid, not merely pledged. Your gift must be cash or a check in the amount of \$100 or more, or stocks or bonds that have a market value of \$100 or more. The Foundation matches gifts on a one-to-one ratio.

IS THERE A LIMIT ON THE AMOUNT OF MATCHING GIFTS? Each qualified individual is eligible to have up to \$1,000 in gifts matched each calendar year. Once your gifts total \$1,000, additional gifts that are made in the same year will not be eligible for a matching gift.

WHAT ORGANIZATIONS MAY RECEIVE MATCHING GIFTS? Three types of organizations are eligible:

A college or university located in the United States which is accredited by one of the following regional accrediting agencies: Middle States Association of Colleges and Schools, North Central Association of Colleges and Secondary Schools, New England Association of Schools and Colleges, Northwest Association of Schools and Colleges, Southern Association of Colleges and Schools or Western Association of Schools and Colleges, or a school listed as an institution of higher education in the Higher Education Directory (published by Higher Education Publications, Inc.);

A college or university located in Canada which is listed as an institution of higher education in the most recent edition of Directory of Canadian Universities (published by the Association of Universities and Colleges of Canada);

A nonprofit private or independent secondary school located in the United States or Canada which is accredited by one of the regional agencies listed above, or by an accrediting program approved by the National Association of Independent Schools (NAIS); or listed as an independent or secondary school in the most recent edition of Schools Abroad of Interest to Americans, or The Handbook of Private Schools, (both published by Porter Sargent Publishers, Inc., Boston, Massachusetts) or The International Registry of Regionally Accredited Schools, (published by CORSAC) or Private Independent Schools (published by Bunting and Lyon, Inc., Wallingford, Connecticut);

For Canadian organizations, the Internal Revenue Service must recognize the recipient institution as either an organization to which contributions are tax-deductible or as a registered charity under Canada's Income Tax Act determined in good faith by The H & R Block Foundation to be an organization described in Internal Revenue Code sections 501(c)(3) or 509(a)(1), (2), or (3).

ARE THERE CONTRIBUTIONS THAT ARE INELIGIBLE FOR MATCHING GIFTS? Contributions ineligible for matching include: (1) payments for tuition, books, loans, or student fees; (2) subscriptions for publications; (3) pooled gifts made by an eligible donor on behalf of ineligible contributors; (4) unpaid pledges; (5) gifts for which the matching funds would provide more than the incidental benefit of recognition for the gift to the donor or the donor's family.

WHOM SHOULD I CONTACT WITH QUESTIONS? If you have any questions regarding The H&R Block Foundation's Matching Gift Program, please contact:

The H&R Block Foundation
(816) 854-4361
foundation@hrblock.com