



## Donation Matching Program Guidelines

Intuit encourages and supports employees' community involvement efforts. Our **We Care & Give Back** Program offers the Donation Matching Program, which provides matching funds to charitable organizations that employees contribute to, *and/or* funds raised through an individual's personal efforts for a charitable organization. We match donations made by eligible employees, dollar for dollar. The match may include a Donation Match, Fundraising Match, or any combination of the two, up to a maximum \$2,000 USD or in-country equivalent maximum limit per employee per fiscal year. Fiscal year is from August 1 – July 31. An annual budget has been allocated to this fund. If this budget limit is reached, payments for the year will be suspended and any employees who apply will be notified.

### WHO CAN PARTICIPATE?

All active employees who work 20 or more hours per week and Intuit seasonal employees who work 20 or more hours per week with 6 months or more of consecutive service. Donations from Spouses/Partners are not eligible.

### WHICH ORGANIZATIONS QUALIFY?

Intuit matches donations to tax-exempt nonprofit organizations –with 501(c)(3) status in the United States. This includes organizations such as colleges and universities, private and public elementary and secondary schools, civic organizations, arts and cultural organizations, health and human service agencies and environmental organizations. (Schools are eligible if they don't promote religious view.)

To qualify in Canada, an organization must be recognized by the Canada Customs and Revenue Agency [CCRA] as a charity, and meet the other guidelines below.

*Before matching any donation or money raised, Intuit verifies that the recipient organization qualifies for the program.*

### WHAT DONATIONS ARE ELIGIBLE FOR MATCHING?

- ◆ Donations must be personal contributions from the donor's personal funds
- ◆ Minimum donation eligible for matching is \$20
- ◆ Maximum match is \$2,000 USD or in-country equivalent maximum limit per employee
- ◆ The donor's limit is calculated per fiscal year
- ◆ Donations must be paid, not simply pledged
- ◆ Donations must be in the form of cash, check, credit card, or marketable securities with a quoted market value. Donations of securities are valued based on the average of the high and low on the date of the donation.
- ◆ Matching funds cannot be used to meet individual pledges or to provide personal benefit.

### WHAT FUNDRAISING DONATIONS ARE ELIGIBLE?

*Under the fundraising component of the Donation Matching Program, an eligible employee may request matching funds from donations received from non-Intuit employees. Intuit employees who donate to your cause need to request their own match. Employee may request a match and be eligible up to the \$2,000 USD or in-country equivalent maximum limit maximum limit.*

- ◆ Event must benefit charity
- ◆ Employee must participate in the event in the same fiscal year that the match is requested
- ◆ Funds must be raised through the employee's individual, personal effort
- ◆ Examples of qualifying fundraising activities include walks, marathons, bike rides, or a similar event that

### HOW THE PROGRAM WORKS

**Online requests can be made in lieu of paper at <http://www.easymatch.com/intuit> - or -**

#### Employee Donor:

- ◆ Complete Part 1 of the Application
- ◆ Mail the *original* form, with the donation and any necessary documentation, to the organization of your choice. The organization must meet the criteria listed in the guidelines. (Faxed copies will not be accepted.)
- ◆ The matching amount provided by Intuit will be for unrestricted support

#### Organization:

- ◆ Complete Part 2 of the *original* Application
- ◆ The authorized officer of the charity must verify the donation, sign the application and return the original form to:

**Intuit Foundation Donation Matching Program  
P.O. Box 2160  
Princeton, NJ 08543-2160**

- ◆ Eligible donations are processed and matched to organizations on the following quarterly schedule:

Donations Certified By:	Grants Paid By:
September 30	October 31
December 31	January 31
March 31	April 30
June 30	July 31

### WHAT DONATIONS ARE *NOT* ELIGIBLE?

- ◆ Requests for individual needs including tuition, scholarships or other financial aid
- ◆ Matching funds cannot be used to meet individual pledges or to provide personal benefit.
- ◆ Dues to alumni(ae) or similar groups
- ◆ Religious organizations (Faith-based agencies are eligible if delivery of social services is non-discriminating and doesn't promote religious viewpoint.)
- ◆ Schools which promote a specific religious viewpoint
- ◆ Political, fraternal, or labor organizations
- ◆ Subscription fees for publications
- ◆ Insurance premiums
- ◆ Bequests or life income trust arrangements
- ◆ With the exception of marketable securities, donations of real or personal property
- ◆ Donor-advised funds

### WHO TO CONTACT FOR MORE INFORMATION

Phone: 1-866-837-1045



## Intuit Foundation

requires an employee's physical exertion

- ◆ Matching funds cannot be used to meet individual pledges or to provide personal benefit.

### TIME LIMIT FOR MATCHING DONATIONS

- ◆ Employee must request the match within one year of making the donation.

Email: [intuit@easymatch.com](mailto:intuit@easymatch.com)  
Website: <http://www.easymatch.com/intuit>



 | *We Care & Give Back*

*Intuit and Intuit Foundation reserves the right to interpret and administer the program as we see appropriate. Intuit and Intuit Foundation reserves the right to decline matching funds to organizations which don't meet the above guidelines, whose objectives are deemed inappropriate, or create a conflict of interest. Intuit and Intuit Foundation reserves the right to cancel the program at any time without prior notice.*



# Donation and Fundraising Match – Application

**INSTRUCTIONS:** Online requests can be made in lieu of paper at <http://www.easymatch.com/intuit>

Employee Donor:

- ◆ Complete Part 1 of the Application
- ◆ Mail the *original* form, with the donation and any necessary documentation, to the organization of your choice. The organization must meet the criteria listed in the guidelines. (Faxed copies will not be accepted.)
- ◆ The matching amount provided by Intuit Foundation will be for unrestricted support
- ◆ If requesting a Fundraising Match, include all checks that you received on behalf of the organization and a copy of your registration or participant ID#. Send checks to the organization for deposit with this application. **Matching funds cannot be used to meet an employee’s legal obligation (minimum pledge) or to provide personal benefit, per IRS laws.**

Organization:

- ◆ Complete Part 2 of the *original* Application
- ◆ The authorized officer of the charity must verify the donation by signing the original form (stamps are not acceptable)
- ◆ If this is your first matching request, enclose a copy of your 501(c)(3) when you return this form to the program.

## PART 1 – EMPLOYEE DONOR COMPLETES

Donation Match or  Fundraising Match

EMPLOYEE ID NUMBER

EMPLOYEE NAME

HOME ADDRESS

CITY/STATE/ZIP

BUSINESS TELEPHONE, INCLUDING AREA CODE

E-MAIL ADDRESS

EXACT DATE OF DONATION

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**AMOUNT OF DONATION (MIN \$20)    AMOUNT OF MATCH REQUESTED (MIN \$20)**

*Please note: The amount in your local current, ie U.S. or Canadian Dollars.*

IF STOCK, NUMBER OF SHARES AND NAME OF STOCK

NAME OF INSTITUTION

CHAPTER NAME (IF ANY)

INSTITUTION CITY, STATE

RESTRICTION OR PURPOSE (IF ANY)

Under penalty of perjury, I certify that neither my family nor I will derive any direct or indirect financial or material benefit from this contribution. I certify that this contribution does not represent payment for tuition, services or other personal financial obligations. I have read and understood the guidelines of the Intuit Foundation Donation Matching Program.

EMPLOYEE SIGNATURE

DATE

## PART 2 - RECIPIENT ORGANIZATION COMPLETES

EMPLOYER IDENTIFICATION NUMBER (EIN)

ORGANIZATION NAME

ADDRESS

CITY/STATE/ZIP

TELEPHONE, INCLUDING AREA CODE

E-MAIL AND WEBSITE ADDRESSES (IF ANY)

DATE RECEIVED

\$ \_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL AMOUNT OF DONATION(S)    TAX DEDUCTIBLE AMOUNT**

*Please note: The amount in your local current, ie U.S. or Canadian Dollars.*

Under penalty of perjury, I certify that this organization meets the eligibility requirements of the Intuit Foundation Donation Matching Program, and that neither the donor nor Intuit will derive any personal material benefit from this donation match.

AUTHORIZED OFFICER’S NAME/TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZED OFFICER

DATE

### MAIL COMPLETED FORM AND REQUIRED ENCLOSURES TO:

**Intuit Foundation Donation Matching Program**  
**P.O. Box 2160**  
**Princeton, NJ 08543-2160**  
**Phone: 1-866-837-1045**  
**E-mail: [intuit@easymatch.com](mailto:intuit@easymatch.com) or**  
**Web site: <http://www.easymatch.com/intuit>**