



Select an option...

Guidelines

- ▶ [What are the provisions of the program?](#)
 - ▶ [Who is eligible to participate?](#)
 - ▶ [How does the program work?](#)
 - ▶ [Conditions](#)
 - ▶ [What institutions are eligible?](#)
 - ▶ [What is NOT eligible?](#)
 - ▶ [The JPMorgan Chase Foundation reserves the right not to match:](#)
-

What are the provisions of the program?

- Gifts of \$25 or more will be matched on a 1-to-1 basis up to \$1,000 per contributor per calendar year.
- Gifts must be made by check, credit card or by negotiable securities that have a publicly listed market value. Gifts of real estate will be matched if an independent appraisal, satisfactory to The JPMorgan Chase Foundation, is submitted.
- Only gifts made by an individual will be matched, gifts made jointly by several employees are not eligible for matching.
- Pledges will not be matched; only gifts already made.
- If a gift is ineligible, you will be notified.

[Back to Top](#)

Who is eligible to participate?

- Only current permanent full-time and salaried part-time employees of JPMorgan Chase & co. and wholly owned subsidiaries, whose annual benefits pay does not exceed \$150,000 are eligible; for definition of benefits pay, see the 2005 Benefits Enrollment Guide on the HR/Benefits site on Company Home.
- Outside members of the corporate Board of Directors.
- Spouses and domestic partners (*not **surviving** spouses/partners*); for definition of **domestic partners**, see the description under the 2005 Qualified Adult Coverage Guide on the HR/Benefits site on Company Home. A spouse's or domestic partner's gifts are included in the employee's annual cap.
- JPMorgan Chase retirees and retired directors gifts are not eligible.

[Back to Top](#)

How does the program work?

You can submit a matching gift request electronically from this website or by using a paper form.

If using the website, send your check to the organization and go to [submit new request](#) to request a matching gift and just follow instructions. After verification that the donor and the institution qualify, a check will be forwarded to the institution. Gifts are matched quarterly on a calendar basis. Checks can be delayed due to incomplete forms, new organizations requiring verification, delayed return of form by the organization, questions concerning eligibility or other missing or incorrect details.

If using paper form:

- Complete and sign Part A of this form and mail the entire brochure, along with the contribution, to the nonprofit organization.
- An officer of the institution receiving the gift should fully complete and sign Part B of the form and return the completed form to JPMorgan Chase's Matching Gift Program.
- Completed forms must be received within one year of the date of the contributor's gift. Foundation checks will be issued quarterly on a calendar basis.
- After verification that the donor and the institution qualify, a check will be forwarded to the institution. Gifts are matched quarterly on a calendar basis. Checks can be delayed due to new organizations requiring verification, delayed return of form by the organization, questions concerning eligibility or other missing or incorrect details.
- Faxed or photocopied signatures are not acceptable.

[Back to Top](#)

Conditions

The Board of Trustees of the JPMorgan Chase Foundation establishes and interprets the rules of the Matching Gift Program. The Board's decisions on these matters are final.

The Foundation reserves the right to audit institutional records and documents pertaining to the Program and to request any documentation. The Foundation considers necessary as a prior condition to matching any gift under the Program.

The JPMorgan Chase Foundation should be credited for all matching gifts that it provides.

This Program is covered by JPMorgan Chase's Code of Conduct and any violation of that code by abuse of this Program by the donor could result in the discharge of the employee or disqualification from the Program.

[Back to Top](#)

What institutions are eligible?

Organizations located in the United States or one of its possessions

Organizations must be charitable organizations, located in the United States or one of its possessions, having tax-exempt status under 501(c)(3) of the Internal Revenue code and designated a public charity or be a government entity under Section 170(c)(1) of the Code. Eligible categories include - but are not limited to - the following:

Organizations not located in the United States or one of its possessions

Not-for-profit, non-proprietary organizations located outside the United States that are organized and operated for charitable purposes are eligible to receive matching gifts from the JPMorgan Chase Foundation.

Arts and Culture

Museums, performing companies, historic preservation, public broadcasting, etc.

NOTE: In the case of memberships, the donor must pay the total cost of the membership, and JPMorgan Chase will then contribute an equal amount. JPMorgan Chase will not pay part of the cost of membership.

Community Development

Housing, economic revitalization, conservation and ecology.

Education

- Degree granting two- or four-year colleges or universities which are accredited by one of the six nationally recognized accrediting commissions.
- Pre-collegiate schools grades K-12 which are accredited by one of the six nationally recognized regional accrediting commissions or by one of the affiliates of the National Association of Independent Schools.
- Public schools.
- Foundations receiving funds for public or private schools or school districts.
- Separately incorporated scholarship programs.

Health and Hospitals

Including medical research and hospices.

Human Services

Including agencies dealing with drug rehabilitation, hunger, AIDS, unemployment, athletic organizations, and programs dealing with youth, child welfare, or the homeless.

Libraries and Literary Programs

Public Issues

Relief efforts.

NOTE: All matching gifts will be unrestricted.

[Back to Top](#)

What is NOT eligible?

- Organization not recognized by the Internal Revenue Service as a charity having tax-exempt status under 501(c)(3), such as fraternal, social, trade, or political organizations, chambers of commerce, and professional membership societies.
- Programs aimed at promoting a political candidate.
- Private schools that are **not** accredited by one of the six nationally recognized regional accrediting commissions or one of the affiliates of the National Association of Independent Schools.

- United Way.
- Tickets of admission, tickets to benefits, or subscription fees for tickets or publications, raffle tickets, dues, auctions, fund-raising events or dinners, or journal ads (or any part of the above).
- Gifts in lieu of payment of tuition or medical bills.
- Gifts made by a group of employees and/or other persons, represented as one gift from an eligible donor, e.g., walk-a-thons.
- Non-scholastic programs within educational institutions, such as athletics, booster clubs or other strictly social associations.
- Groups which address issues, or which support others that address issues, by means of adversarial and confrontational tactics.
- Gifts **TO** or **FROM** a charitable gift fund, such as Fidelity Charitable Gift Fund, or a family fund, family foundation or other private foundation.

[Back to Top](#)

The JPMorgan Chase Foundation reserves the right not to match:

- Religious organizations or programs aimed at promoting a particular faith or creed, or programs that are otherwise religious. Programs that operated under the sponsorship of a religious organization that are separately incorporated as independent, non-religious, tax-exempt organizations **are** eligible, if there is no requirement to participate in religious activities.
- Gifts which, either standing alone or in conjunction with a Matching Gift, result in the donor or a specified individual receiving substantial benefits.
- Organizations which discriminate with respect to membership and/or the provision of service or use of facilities.
- Organizations under investigation, or reported to be under investigation, by any state or federal authority.
- Organizations or individuals designated by the U.S. Treasury Department's Office of Foreign Assets or on any other similar list.

[Back to Top](#)

[Home](#) | [Submit New Request](#) | [Guidelines](#) | [FAQ](#) | [Matching Gift History](#) | [Organization Lookup](#) | [Site Map](#) | [Contact Us](#)
