



**Matching Gifts Program Application Form**  
(One Gift Per Form)

**DONOR: Please complete the section below.**

Social Security Number:	
Donor's Name:	
Home Address:	
City, State, Zip Code:	
Telephone: (        )	
Name of Recipient Institution:	
Street Address:	
City, State, Zip Code:	
Date of Gift:	Amount (for gifts of marketable securities, state the dollar amount of your charitable contribution deduction):

I certify that the information submitted is correct and that my gift fully complies with the provisions of the program.

Donor's signature: \_\_\_\_\_

**INSTITUTION: Please complete the section below and return to:**  
**KnowledgeWorks Foundation Matching Gifts Program**  
**One West Fourth Street, Suite 200, Cincinnati, OH 45202-3611**

I certify that the above indicated gift has been received and that it will be used to support the charitable or educational objectives of the institution, which is recognized by the IRS as a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code, or a tax-exempt political subdivision described in Section 170(c)(1) of the Internal Revenue Code	
Tax Identification number (Required):	
If College or University, Accredited by:	
Signature of Authorized Financial Officer:	Date: Amount of Gift*:
<i>*The amount of the contribution minus the value of any goods or services provided to the donor.</i>	
Title:	Telephone:

**FOR KNOWLEDGEWORKS FOUNDATION USE ONLY**

Date Received:	Amount Matched:
Code:	Activity Number:



**KnowledgeWorks®**

**Matching Gifts Program**

**Program Guidelines**

**KnowledgeWorks Foundation Will Match**

- Individual contributions of at least \$25 will be matched dollar for dollar. The total maximum per individual donor that will be matched is \$1,000 per year. The maximum is \$3,000 per year under the Directors' program.
- Gift amounts must be actually paid, not merely pledged for payment, to an eligible institution in the current fiscal year, certified by the recipient organization and received by the Matching Gifts Administrator within 30 days of the fiscal year-end.
- Gifts must be in cash or marketable securities for which quotes are readily available on a national securities exchange.

**Eligible Donors**

- Full and part-time employees of KnowledgeWorks Foundation and Directors of KnowledgeWorks Foundation.

**Eligible Gifts**

- The Foundation's matching gifts are unrestricted gifts paid directly to an eligible institution or school as defined in the Eligible Institutions section of this document.

## Eligible Institutions

- Charitable and educational institutions that meet all of the following criteria:
  - Located and primarily operating in the United States
  - EITHER: (I) a tax-exempt charitable or educational organization recognized by the IRS as exempt from income tax under Section 501(c)(3) of the Internal Revenue Code that is not a private foundation; or (II) a tax-exempt political subdivision of a state or a possession of the United States as described in Section 170(c)(1) of the Internal Revenue Code, e.g. a public school district.
  - EITHER: (I) an educational institution (elementary school, secondary school, or a nationally or regionally accredited degree granting two or four-year private or public college or university, including schools or colleges within a university that conducts their own fund-raising effort); or (II) a non-educational institution, to the extent that the donation is intended to support a program for the instruction of the public on subjects useful to the individual and beneficial to the public.
- Also eligible are:
  - Alumni funds or foundations affiliated with an eligible educational institution, if they are recognized by the Internal Revenue Service as tax-exempt and the institution certifies that all such contributions are applied directly to or support its primary educational objectives.

## Ineligible Institutions

- Fraternities, sororities, honor societies, educational associations, and campus organizations.
- Seminaries, theological institutions, bible colleges, and other religious post-secondary schools which restrict entry to those students who profess a faith or belong to a specific denomination or sect, or whose graduates (50% or more) are prepared for a religious profession such as minister, religious education, missionary, etc.

## Ineligible Gifts

- Payments in lieu of tuition, class dues, books, or other student fees.
- Contributions in support of athletic programs or athletic scholarships.
- Contributions that are made as a consequence of, or lead to, a material, direct benefit to the donor, a member of the donor's family, or to an individual designated by the donor, or are used to satisfy a legal obligation of the donor.
- Contributions to scholarship funds established in the name of the donor or where the scholarship recipient is designated by the donor.
- Contributions for the receipt of tickets for admissions, dinners or performances.
- Testamentary gifts.
- Non-cash contributions, other than marketable securities, such as real property, works of art, or donated labor.

## Administrative Conditions

- The interpretation, application, and administration of this program, which may be suspended, amended, or terminated at any time, will be determined solely by the Foundation. No obligation is imposed upon or accepted by the Foundation, by reason of the Matching Gifts Program.
- Institutions or organizations that meet the specific criteria will be considered for participation but determination of an institution's initial and continuing participation shall be made solely by the Foundation.

## Instructions

- Donor -Verify that the Donor portion of the application is complete and mail this form and the contribution to the eligible institution. Please sign the application.
- Recipient Institution -Verify that the gift complies with provisions of the program. Complete the Institution section. Mail the form to the address noted on the form.