



[Home](#)  
 [Submit New Request](#)  
 [Guidelines](#)  
 [FAQs](#)  
 [Giving History](#)  
 [Organization Lookup](#)  
 [Site Map](#)  
 [Contact Us](#)  
 [Login](#)

## Guidelines

- ▶ [Introduction](#)
- ▶ [How Does the Program Work?](#)
- ▶ [Who is Eligible to Participate?](#)
- ▶ [Which Organizations Are Eligible for Matching?](#)
- ▶ [What are the Eligibility Requirements for Contributions?](#)
- ▶ [What Kinds of Contributions Are Ineligible for Matching?](#)
- ▶ [Administrative Conditions](#)

---

### Introduction

LPL Financial Services is proud to introduce the *Invest in Others* Matching Gift Program. This program is made possible through generous donations to the *Invest in Others* Charitable Foundation by our product sponsors, our private equity partners and LPL. This foundation was created to directly support LPL Financial Advisors who are working to make a difference in their communities and are involved with many worthy causes. Through this program, beginning January 1, 2007, LPL Financial Advisors may request a matching gift from the *Invest in Others* Charitable Foundation after giving a personal donation to an eligible charitable organization.

[Back to Top](#)

---

### How Does the Program Work?

LPL Financial Advisors may request matching gifts through a quick, user-friendly, online request process via the *Invest in Others* Matching Gift program web site.

Following receipt of the request, the *Invest in Others* Matching Gift Program administrator will contact the organization to verify receipt of the donor's gift.

Eligible requests are processed on the following quarterly schedule (For example, *if a request for matching has been submitted and the eligibility of the gift has been reviewed and approved by April 1, payment will be made to the recipient organization by April 30th.*)

Received By:	4/1	7/1	10/1	1/1
Processed By:	4/30	7/31	10/31	1/31

More information is available on the program web site at [www.easymatch.com/lplinvestinothers](http://www.easymatch.com/lplinvestinothers). The website contains program related information such as FAQs, and the ability to view personal giving history and search for charitable organizations.

For additional questions, LPL Financial Advisors may contact the *Invest in Others* Matching Gift Program administrator via email at [lplinvestinothers@easymatch.com](mailto:lplinvestinothers@easymatch.com) or call (866) 788-1243.

[Back to Top](#)

---

### Who is Eligible to Participate?

All LPL Financial Advisors are eligible to participate in the *Invest in Others* Matching Gift Program. Spouses and office staff are not eligible.

[Back to Top](#)

---

### Which Organizations Are Eligible for Matching?

Nonprofit organizations located in the United States or in one of its possessions are eligible for matching. These

organizations must be recognized by the Internal Revenue Service as tax-exempt and designated either as a public charity under Section 501(c)(3) of the IRS Code or as an instrumentality of a federal, state or local government as provided by Section 170(c)(1) of the Code.

Eligible organizations include, but are not limited to: accredited colleges and universities, accredited private and public elementary and secondary schools, arts and culture organizations, health and human services agencies, civic organizations, and environmental organizations. Donations to ongoing and independently run programs affiliated with religious organizations are eligible for matching if the donation is restricted to a nonsectarian project that provides needed social services to the community at large on a non-discriminatory basis without any religious teaching, directive or requirements to receive services (e.g., a soup kitchen, a homeless shelter, a food bank, etc.).

[Back to Top](#)

---

### What are the Eligibility Requirements for Contributions?

- The minimum contribution amount eligible for gift matching is \$100.
- The maximum contribution amount matched per donor per calendar year is \$250. Matches must be requested within one year of the gift date. Additionally, advisors are limited to one match per calendar year. **Special Note:** The foundation will have a specified funding amount each year. If matching requests exceed monies available, grants will be served on a first come, first served basis.
- Contributions must be made on or after January 1, 2007.
- Contributions must be made in the form of a personal check or credit card (contributions may be charged and a match requested from the Invest in Others Matching Gift Program website at [www.easymatch.com/lplinvestinothers](http://www.easymatch.com/lplinvestinothers)).
- Donor may be requested to provide proof of the contribution in the form of a cancelled check, bank statement, or credit card statement.

[Back to Top](#)

---

### What Kinds of Contributions Are Ineligible for Matching?

- Contributions made by or through Community Trusts or similar organizations, including Charitable Remainder Trusts, Donor Advised Funds, or Family Foundations
- Contributions made in lieu of tuition payment for services
- Contributions for primarily political or religious purposes, unless specified for a community outreach program as discussed above
- Subscription, membership or any other fees for which benefits are received in exchange for contribution
- Bequests or life income trust arrangements
- Gifts of real or personal property
- Cumulative gifts from several individuals reported as one contribution

[Back to Top](#)

---

### Administrative Conditions

The *Invest in Others* Charitable Foundation reserves the right to interpret, apply, amend or revoke the program and/or the guidelines at any time without prior notice.

Organizations approved in the past may not qualify for the *Invest in Others* Matching Gift Program in subsequent years if new information is received regarding the loss of their tax status, change in their mission or if their programs indicate the organization falls outside of the *Invest in Others* Matching Gift Program guidelines.

[Back to Top](#)