

# Matching Gifts Program

**The Program provides employees and partners with the opportunity to double the financial contributions they make to their favorite, eligible non-profit organizations across the United States.**

## Who may participate?

- Full-time, active, benefits-eligible employees and partners

## What gifts are eligible for matching?

- Gifts for personal contributions (not pledges) made to an eligible organization in cash, credit card, or securities having a quoted market value

## What gifts are *not* eligible for matching?

- Bequests and deferred-giving plans
- Combined gifts of a group of persons represented as one gift from an eligible donor
- Membership payments, dues and subscription fees, insurance premiums, tuition fees, loan repayments
- Gifts of real estate or other property (except securities, as mentioned above)
- Gifts that result in the employee or family member receiving a benefit (e.g., auction items, raffle tickets, sponsorships, etc.)
- Pledges
- Gifts made by spouses, other family members, consultants, interns, and temporary employees

## What is the minimum gift amount and the total dollar amount that will be matched in a calendar year?

- \$25 is the minimum amount of any one gift
- \$1,000 is the total dollar amount of all gifts that will be matched in a calendar year
- Gifts will be matched dollar for dollar up to the \$1,000 maximum

## What organizations are eligible?

- Non-profit organizations that are certified as tax exempt by the Internal Revenue Service under Section 501(c)(3) of the Internal Revenue Code (with the exception of the United Way and all other federated agencies) or any instrumentality of a federal, state, or local government as provided by Section 170(c)(1) of the Code. All organizations must be located in the United States or one of its possessions. Listed below are examples of organizations within their broadly defined categories:

### Higher Education institutions

- Accredited, non-profit private and public degree-granting graduate and professional schools, universities, two-year colleges, and four-year colleges

### Kindergarten through 12th grade schools

- Public schools accredited or recognized by the appropriate governmental educational entity within the state
- Private schools accredited or recognized by an appropriate academic accrediting organization

### Cultural, arts, civic, and environmental organizations

Organizations must be open to, and operating for the benefit of, the general public. Organizations eligible for gift matching are limited to the following areas:

- Performing arts companies in dance, drama, opera, and music
- Arts and cultural centers, science centers, and public libraries
- Museums, zoos, aquariums, and botanical gardens

- Land trusts, including parks and sanctuaries (to qualify, the recipient organizations must own the land)
- Public radio and public television stations
- Historical societies

### Health and human services

- Accredited hospitals, clinics, long-term care facilities, medical research, health education and prevention, disease-specific organizations, etc.
- Organizations addressing hunger, unemployment, human rights, community development, housing, needs of the elderly, youth, and families, etc.

## What organizations are *not* eligible?

- Religious organizations, including churches, synagogues, campus-based faith organizations, missions, religious orders, and programs associated with the aforementioned, except for accredited educational institutions
- Fraternities, sororities, and alumni groups
- Chambers of commerce, labor unions, and political organizations
- Veterans, trade, or industry organizations
- Professional athletic teams
- United Way and all other federated agencies

## What is the process to follow to participate in the matching gifts program?

- Employee (Donor) completes Part A of the Matching Gifts Form and sends along with his/her donation to the organization that will receive the gift (Recipient Organization)

All applicable information requested on the form must be provided. The recipient organization must complete Part B of the form and return it to:

**Lord, Abbett & Co. LLC**

**Matching Gifts Program**

**P.O. Box 3288**

**Princeton, N.J. 08543-3288**

**Toll-free Phone Number: 1-877-519-1838**

**E-mail Address: lordabbett@easymatch.com**

Questions may be directed via phone to the Program's toll-free phone number or e-mail address.

## When will the matching gift be paid?

Matches are paid quarterly. Gifts must be verified by the recipient organization before they are scheduled for payment.

Forms Received By:	Payment Will Be Processed By:
December 1	December 31
March 1	March 31
June 1	June 30
September 1	September 30

## How do I know if my gift will be matched?

Donor will receive written confirmation that his/her gift is being matched. Likewise, both the donor and the recipient organization will receive written notification if a gift is denied. Decisions by Lord, Abbett & Co. LLC regarding eligibility, interpretation, and administration of the Matching Gifts Program are final. Lord, Abbett & Co. LLC reserves the right to suspend, amend, or terminate this Program at any time, for any reason without advance notice.

# Matching Gifts Program Application Form



## PART A: DONOR (EMPLOYEE/PARTNER)

Complete Part A (only) and mail this form, along with your gift, to the Recipient Organization. All applicable information requested must be provided. Please PRINT legibly. If a photocopied form is used, please copy both sides.

Employee/Partner Name: \_\_\_\_\_

Home Address: \_\_\_\_\_  
Street City State Zip Code

Business Phone Number: \_\_\_\_\_ Business E-mail Address: \_\_\_\_\_

Name of Recipient Organization: \_\_\_\_\_  
City State

Date of Gift: \_\_\_\_\_ Amount of Gift: \$ \_\_\_\_\_ Amount to Be Matched: \$ \_\_\_\_\_

Form of Gift:  Cash/Check  Credit Card  Security

Please provide the following information if a security is given.

\_\_\_\_\_  
Number of Shares Name of Security Market Value on Gift Date

Designation: \_\_\_\_\_

I hereby certify that the information I have provided is complete and correct, that my gift complies with the program provisions stated in this document, and that my gift is a voluntary contribution made from my own resources and not from a gift of any other person or organization. My gift does not represent in any way tuition or payment in exchange for benefits received, nor is it given because I expect some monetary or other benefit to be given to me or to any other person or organization named by me. In addition, my gift should not be used for religious or political purposes.

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## PART B: RECIPIENT ORGANIZATION

Complete Part B (only) and return to: The Lord, Abnett & Co. LLC Matching Gifts Program · P.O. Box 3288 · Princeton, N.J. 08543-3288

Toll-free Phone Number: 1-877-519-1838; E-mail Address: lordabbett@easymatch.com

If this is your first time requesting a Matching Gift, please attach a copy of your IRS 501(c)(3) Federal Tax Exemption Letter and a copy of your organization's mission statement.

Name of Recipient Organization: \_\_\_\_\_  
Federal Tax Identification Number

Mailing Address: \_\_\_\_\_  
Street City State Zip Code

\_\_\_\_\_  
Telephone Fax E-mail Address Website Address

Date Gift Received: \_\_\_\_\_ Gift Amount Received: \$ \_\_\_\_\_ Tax Deductible Amount: \$ \_\_\_\_\_

Form of Gift:  Cash/Check  Credit Card  Security

If a security is donated, please complete the following:

Number of Shares: \_\_\_\_\_ Name of Security: \_\_\_\_\_

I hereby certify that the gift contributed by the individual identified in Part A has been received and that this organization is tax exempt under the Internal Revenue Code, Section 501(c)(3). The gift fully complies with the program provisions stated in this document.

Name: \_\_\_\_\_ Title: \_\_\_\_\_  
(Please Print) (Please Print)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_