

Request for Lumina Foundation for Education, Inc., Matching Gift Program

(Please type or print to fill out all fields. Incomplete forms will be returned to the Donor or Recipient Organization.)

PART 1: Donor

Donor completes Part 1 and forwards his/her gift and the form to the recipient organization.

Full Name _____

Address _____

City _____ State _____ Zip Code _____

(check one)

I am: a Lumina employee a Lumina director
 a retired Lumina employee a former Lumina director

Recipient Organization _____ Date of gift _____

Organization address _____

The purpose of my gift and the Matching Gift **(required)**:

Method of Payment: Donor

1. \$ _____ *(Payable by cash, check or credit card, minimum \$25)*

2. _____ shares of _____ stock
with a quoted market value of _____ per share or a total of \$ _____

I request that Lumina Foundation make a Matching Gift equal to three times the amount of my gift OR equal to the lesser amount of \$ _____

The Matching Gift will not be credited to any pledge of mine or be held in any donor-advised fund over which I have discretion. Funds may not be credited to memberships or tuition.

The Matching Gift *(check one)* will will not involve a conflict of interest under any applicable code or policy of Lumina Foundation. If it will, I am making a full disclosure to the Foundation.

Donor signature _____ Date _____

Return completed form to: **Lumina Foundation for Education, Inc., Amie Michael, Grants Assistant / Matching Gift Program,**
P.O. Box 1806 Indianapolis, IN 46206-1806 Phone: 800-834-5756 Fax: 317-951-5063

PART 2: Recipient

We have included our Federal Tax ID (EIN number) which will be used to verify the organization as a public charity as described in sections 501(c)(3) and 509(a). *Please read the full explanation in guidelines on the back of this form.*

Forward the **original form** to the address printed below.

By signing and submitting this form, the organization agrees to use the donor's gift and the Matching Gift for the purpose set forth in Part 1.

Name of your organization

Address

City _____ State _____ Zip Code _____

Federal Tax ID number: _____

Name of Contact Person and Title

Email: _____ Phone _____

Gift Received: Recipient

Gift received was *(check one)*:

Cash or check Credit card Stock or other securities*

No goods, services or other benefits have been or are to be received by the donor.

If goods, services or other benefits were received by the donor, the fair market value is \$ _____. *(See Section f under Guidelines for Recipient Organizations on the back of this form for instructions.)*

*If the donor's gift in whole or part was in stock or other securities:

A copy of an advice or record indicating the securities transferred and date of receipt is enclosed.

Date received: _____

Signed on behalf of the organization (signature) Date

Printed name and title

| Part 3: To be completed by Lumina Foundation | | |
|---|------------------------------------|---------------------------|
| Approved by | Amount \$ | Date |
| Account | Business Unit | Department ID |
| <input type="checkbox"/> IRS Determination Letter | <input type="checkbox"/> Web Check | Initials of Administrator |



Lumina Foundation for Education, Inc., Matching Gift Guidelines *

Eligibility

- Current employees of Lumina Foundation for Education
- Members of the Board of Directors of Lumina Foundation for Education
- Retired employees of Lumina Foundation
- Former Directors of Lumina Foundation

Guidelines for Donor Participation:

- a.) The organization's Federal Tax ID (EIN number) is required from all recipient organizations. Qualified organizations will have a 501(c) (3), 509 (a) status.
- b.) Please note that Lumina Foundation for Education does not make grants to (a.) supporting organizations controlled by disqualified persons to Lumina, or (b.) Type III supporting organizations that are not functionally integrated Type III supporting organizations (as such terms are defined in the Internal Revenue Code). If the recipient organization is such an organization, the recipient organization may not cash the grant check and must return the grant funds promptly to Lumina Foundation.
- c.) Donors complete Part 1 of the matching gift form and send the entire form to the recipient organization. The recipient organization completes Part 2 and returns the form to Lumina Foundation.
- d.) **Incomplete forms will be returned to the Donor or to the Organization.**
- e.) Gifts of cash or securities with a quoted market value will be matched on a 3:1 basis or at a lesser amount as indicated by the donor. The value of a gift of securities with a quoted market value is determined by the closing market price on the date of the gift.
- f.) Matching gifts may not be credited towards memberships, pledges or tuition payments
- g.) Lumina will make matching donations up to a total of \$60,000 per donor, per year. Any balance remaining may not be carried over into subsequent years.
- h.) Each gift must be a minimum of \$25.00 and submitted on a separate form.
- i.) Lumina Foundation must receive a completed matching gift form from the recipient organization within 60 days of a donor's gift, **but in no event later than February 28th in the year after the gift.**
- j.) Matching gifts will be made by check and paid directly to the recipient organization. Exceptions will be determined on a case-by-case basis.
- k.) Donors will receive a copy of the letter that accompanies the check sent to the recipient organization as confirmation that their donation was matched.

Guidelines for Recipient Organizations:

- a.) The organization's Federal Tax ID (EIN number) is required from all recipient organizations. Qualified organizations will have a 501(c) (3), 509 (a) status.
- b.) Please note that Lumina Foundation for Education does not make grants to (a.) supporting organizations controlled by disqualified persons to Lumina, or (b.) Type III supporting organizations that are not functionally integrated Type III supporting organizations (as such terms are defined in the Internal Revenue Code). If the recipient organization is such an organization, the recipient organization may not cash the grant check and must return the grant funds promptly to Lumina Foundation.
- c.) Lumina Foundation must receive a completed matching gift form from the recipient organization within 60 days of a donor's gift, **but in no event later than February 28th in the year after the gift.**
- d.) The recipient organization completes Part 2 of the matching gift form and returns the entire form with donor and recipient information to the address at the bottom of this page.
- e.) **Incomplete forms will be returned to the Donor or to the Recipient Organization.**
- f.) Political parties or organizations that seek to influence legislation are not eligible to receive matching gifts from Lumina Foundation.
- g.) Gifts that fulfill a membership, a pledge or lead to any direct material benefit of the donor or the donor's family may not be part of the matching gift program. Only that portion of the gift that exceeds the sponsorship, membership or other obligation may be matched by Lumina Foundation. (Example: Your organization's membership dues are \$60. The donor member sends you a check for \$100. The matchable portion of the gift is \$40.)
- h.) Matching gifts may not be credited towards tuition payments.
- i.) When shares of stock are given as a gift, the recipient organization should include documentation stating the date the stock was received and a copy of an advice or record that indicates the date these securities were transferred.

Return the completed and signed form to:

Lumina Foundation for Education, Inc.

Attn: Amie Michael

Grants Assistant / Matching Gift Program

P.O. Box 1806

Indianapolis, IN 46206-1806

Questions? Please call 800-834-5756. Fax: 317-951-5063

**Lumina Foundation determines all aspects of Lumina Foundation's Matching Gift Program including participant and recipient eligibility, and may amend or terminate the program at any time. The program was last amended April 21, 2005.*