



# MATCHING GIFT PROGRAM

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**PART A – TO BE COMPLETED BY THE MCMASTER-CARR EMPLOYEE /SPOUSE /RETIREE**

(Please read carefully the rules governing the Matching Gift Program on the reverse side of this form) Last

Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

Name of Organization: \_\_\_\_\_

Organization Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Date of Gift: \_\_\_\_\_ Gift Amount: \$ \_\_\_\_\_

Employee       Spouse/Domestic Partner (Employee Name: \_\_\_\_\_ )       Retiree

I authorize the institution/organization to report this gift to McMaster-Carr Supply Company under the Matching Gift Program, and affirm this is a personal gift that is not combined with other gifts and will not be used to fulfill payment of services or tuition.

\_\_\_\_\_  
Print Individual's Name

\_\_\_\_\_  
Individual's Signature

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**PART B – TO BE COMPLETED BY A FINANCIAL OFFICER OF THE INSTITUTION/ORGANIZATION**

Officer Name: \_\_\_\_\_ Title: \_\_\_\_\_

Fed Tax ID# \_\_\_\_\_ Officer Email Address: \_\_\_\_\_

Name of Organization: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Amount of Gift: \$ \_\_\_\_\_ Telephone Number: \_\_\_\_\_

I certify that the gift above has been received, no goods or services were provided and that this organization is tax exempt under Section 501(c)(3) of the Internal Revenue Code.

Officer's Signature \_\_\_\_\_ Date \_\_\_\_\_

Please mail completed form to:      McMaster-Carr Supply Company  
Attn: Benefits Administration  
P.O. Box 150  
Elmhurst, IL 60126

Please list McMaster-Carr gifts as "anonymous". For tax purposes, all Company gifts require written receipt on organization letterhead.

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Internal Use Only

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Benefits Administration Approval

Date

Manager Approval

Date

Officer Approval

Date



## MATCHING GIFT PROGRAM

Orchestras, dance, opera and choral groups

### PURPOSE

The McMaster-Carr Supply Company Matching Gift Program is designed to provide eligible institutions with additional charitable contributions on behalf of our employees. The intent is to augment support which you may already be providing or wish to provide.

### ELIGIBLE INDIVIDUALS

1. All full-time and part-time employees, their spouses or domestic partners.
2. All retired employees (retired at or after the age of 55 with at least ten years of service), their spouses or domestic partners.

### ELIGIBLE CONTRIBUTIONS

To qualify, gifts must be personal contributions actually made, not merely pledged, nor bundled with gifts from others. Cash, credit card and marketable securities sent directly to the institution or via the internet are eligible.

McMaster-Carr will match annually an amount equal to a minimum of \$25 and a maximum of \$5,000 per family. Qualified grants under the Dollars for Doers Program will count towards the \$5,000 annual maximum.

Your contribution may be limited to a specific purpose or left unrestricted. However, all matching gifts from McMasterCarr are unrestricted and are intended to help meet the needs of the institution.

### ELIGIBLE ORGANIZATIONS

To qualify, recipient organizations must be located in the U.S. and be recognized as a tax-exempt, public charity under Section 501 (c)(3) of the Internal Revenue Code. Generally speaking, eligible organizations must be non-sectarian, nonpolitical and open to full non-discriminatory public participation. The Matching Gift Program intends to support the following types of organizations:

Health and Human Services – examples include but are not limited to:

- Hospitals, health or disease prevention agencies
- Welfare and youth organizations
- Shelters for the disabled and homeless
- Soup kitchens & food banks

Arts/Cultural – examples include but are not

- limited to: Museums of arts, sciences, and history
- Public libraries, television or radio
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Education – examples include but are not limited to:

Accredited U.S. post secondary degree granting academic institutions – professional, undergraduate or community colleges (except theological or religious institutions limited to a specific group)

- Technical schools
- Literacy and tutoring programs
- Educational/Scholarship Funds (provided donor does not designate a specific individual as recipient)

Civic/Other – examples include but are not limited

- to:
- Animal welfare
  - Conservation
  - Community revitalization and volunteer services

### EXCLUSIONS

Some examples of organizations or types of gifts that do not qualify for the Matching Gift Program include:

- Elementary and secondary schools
- Preschool and day care centers
- Alumni groups whose funds are not distributed to affiliated eligible institutions
- Contributions in lieu of tuition, books, or other student fee
- Clubs, fraternities, or sororities
- Religious organizations
- Political or activist organizations “Bundled”
- contributions from non-employees for fund raising activities (e.g. Marathons, Bike-/Walk-A-Thons, etc.)
- Bequests
- Publications or subscription fees
- Non-scholastic programs such as athletics or stadium construction

### OPERATION OF THE PROGRAM

#### EMPLOYEE/RETIREE

To make a contribution to an eligible organization, complete Part A of this form. Then send the entire form, together with your contribution, directly to the not-for-profit organization. Please contact Benefits Administration if you wish to verify that your contribution is eligible to be matched.

**INSTITUTION**

To receive a matching gift contribution, complete Part B and return this entire form within 90 days of receipt to:

McMaster-Carr Supply Company  
Attn: Benefits Administration – Matching Gifts  
P. O. Box 150  
Elmhurst, IL 60126

Checks for approved matching gifts will be mailed quarterly.

**ADMINISTRATION**

The McMaster-Carr Matching Gift Program is administered by the Benefits Administration Department. McMaster-Carr reserves the right to change or discontinue this program at any time. The interpretation, application and administration shall be determined by McMaster-Carr and its decisions will be final.