

Motiva Matching Gifts Guidelines



The Matching Gift Program is designed to encourage employees of Motiva Enterprises LLC to give financial aid to high schools, technical institutes and community colleges, junior colleges, colleges and universities, and graduate and professional schools of their choice. The philosophy of matching gifts is that we, both as individuals and a business, have a responsibility to recognize and support the many educational institutions in the communities where we live and work.

Who Can Participate?

All full-time employees of Motiva Enterprises LLC who have completed one year of uninterrupted, regular, full-time service prior to the date of the contribution.

Donors may make gifts to more than one eligible institution and need not be alumni of the institutions to which they give. Where gifts are made by more than one company employee to an institution, Motiva will issue a single check, and each donor will receive confirmation.

How is The Plan Organized?

The Motiva Matching Gifts Program will provide a dollar-for-dollar match on personal contributions up to and including \$5,000 per individual per calendar year. The minimum gift eligible for matching is \$25.

Eligible Educational Institutions

Only high schools and higher education institutions are eligible. These include: public and private high schools; graduate and professional schools; four-year and two-year colleges; and technical institutes.

The institutions must be degree granting, located in the United States or one of its possessions, accredited by a nationally recognized regional or professional association, and recognized by the IRS as a tax-exempt educational institution.

In addition, the following organizations are eligible: The American Indian College Fund, The Hispanic Association of Colleges and Universities and The United Negro College Fund. Alumni funds for scholarships and educational programs are eligible. No other funds or federations are eligible.

Gifts that cannot be matched

- Forms received more than one year after the date of the gift.
- Payments for which the Donor, their family, or other individuals designated by the Donor receive a direct benefit. Examples include:
 - Payments for services, tuition, books, or other student fees.
 - Gifts to fulfill pledges, tithes or other religious-related financial commitments or legal obligations, publication subscription fees, membership dues, or ticket purchases.
 - Insurance premiums; Bequests.
 - Gifts must be personal contributions from the Donor's own assets. Gifts are ineligible if the donation includes: gifts from spouses, other family members or contributions made jointly by several individuals.
- Gifts to ineligible organizations. Examples include:
 - Gifts to primary schools.
 - Alumni associations, athletic associations, booster clubs, parent-teacher associations or organizations, etc.
 - Contributions to individuals, fraternities or sororities.
 - Gifts given to or through a third party.
 - Gifts for nonscholastic purposes. The gift must support the primary educational mission of the institution. Dinners, events, athletics, athletic scholarships, marching band, stadium construction or maintenance are typical ineligible gifts.
- Gifts must be charitable contributions, which can be deducted by the individual for federal income tax purposes.

How to Apply for a Matching Gift

- There are two ways to submit a Matching Gift request. You may use the EasyMatch Program Website at <http://www.easymatch.com/Motiva> to submit your gift request electronically. Or fill out a Matching Gift form and send it along with your donation to the organization to which you are contributing. The organization should complete its portion of the form and forward it for matching.
- **Properly completed applications must be received by December 1st of the year they are made.**
- Matches are made quarterly. Eligible requests received by the first of March, June, September, and December are included in the current quarter's payment. Requests arriving after this date are processed during the following quarter.
- An educational organization receiving an employee's gift of money will be asked to confirm receipt of the gift. If the school has never received a matching gift through The Motiva Matching Gift Program, it will be asked to provide proof of tax-exempt status. The school will also be evaluated to ensure it meets all guidelines of the program.
- Completed applications should be mailed to:

**Motiva Enterprises LLC
Matching Gift Program
P.O. Box 2195
Princeton, NJ 08543-2195
Phone: 1-877-321-8218
Fax: 1-609-799-8019**

- An acknowledgement of all gifts made on a donor's behalf during a given calendar year will be sent to the donor no later than January 31 of the following year.



Motiva Matching Gifts Grant Application

Matches are made quarterly. Eligible requests received by the first of March, June, September, and December 1st are included in the current quarter's payment. Requests which arrive after these dates are processed during the following quarter.

SECTION A – MOTIVA EMPLOYEE INFORMATION

Employee Name

Last 4 Digits of Employee Social Security Number

E-mail Address

Address (including City, State, and Zip)

Date of Gift

\$ Amount

Educational Institution

I certify that the information submitted is correct and represents my personal gift under the provisions of the Matching Gifts program.

Employee Signature

Date

SECTION B – NONPROFIT ORGANIZATION INFORMATION

A gift of \$ _____

was received on _____

Educational Institution

Address

City, State, Zip

Telephone

Fax

E-mail

I certify receipt of the above stated gift.

Authorized Signature

Title

Date

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