



EMPLOYEE'S MATCHING GIFTS GUIDELINES

The Nellie Mae Education Foundation sponsors a program matching charitable gifts made by its employees to educational institutions and organizations. Our matching gift program is intended to encourage employees of the Foundation and their spouses to participate in charitable giving to institutions and organizations that support our mission.

Foundation Employees:

- All persons currently employed by the Nellie Mae Education Foundation and their spouses are eligible to participate in this program.
- The Foundation will provide matching gift(s) at a **3:1 ratio, up to \$9,000** per calendar year, per employee (and spouse, collectively) with a minimum of \$25 to any one organization.
- For each Matching Gift request employees should:
 - Complete top portion of the form on back
 - Sign where indicated (a stamped signature is not adequate for this purpose)
 - Send form to Recipient Organization

Grantee Eligibility:

- Grants can be designated to educational organizations within the class of charities designated in the Nellie Mae Education Foundation's article of organization, namely, educational organizations described in section 501(c)(3) of the Internal Revenue Code. Note that this includes a broader group than educational "institutions". Educational organizations include, for example: :
 - Public schools, colleges and universities.
 - Private schools, including elementary, secondary, colleges and universities, graduate or professional schools, which are tax exempt under section 501 (c)(3).
- Other nonprofit organizations which are tax exempt under section 501(c)(3) that instruct the public on subjects useful to individuals and beneficial to the community, including organizations that present public and discussion groups, forums, lectures and similar programs, as well as museums, zoos, planetariums, symphony orchestras and similar organizations. When the grant is being directed to other nonprofit organizations, grants must be designated for a specific educational program or project of the grantee organization, rather than designating the grant for general support or capital projects.
- **Please Note:** Due to Nellie Mae Education Foundation's tax status, private foundations (described in section 509(a) or the Internal Revenue Code) and supporting organizations (described in section 509(a)(3) of the Internal Revenue Code) are NOT eligible grantees.

Recipient Organization:

- Verify the accuracy of the information provided by Foundation employee in the top portion of the form on back
- Complete bottom portion of the form
- **Mail form to:**

Susan Borden
Nellie Mae Education Foundation
1250 Hancock Street, Suite 205N
Quincy, MA 02169

Questions:

- Contact Stephanie Cheney at scheney@nmefoundation.org or 781.348.4240



Nellie Mae Education Foundation Matching Gift Form

Foundation Employee fills out this section

Click here to enter text.

Name of Grantee Organization

Click here to enter text.

Educational Fund, Program, or Project Name

Click here to enter text.

Address of Organization

Click here to enter text.

EIN (Employer Identification Number)

Click here to enter text.

City, State Zip Code

Click here to enter text.

Name & Title of Contact Person

Click here to enter text.

Telephone Number & E-mail Address

Click here to enter text.

Donor's Relationship to Recipient Organization

I certify that this grant is solely for the use of the organization named and neither I, nor any member of my family, will secure any economic or other benefit from this grant.

Click here to enter text.

Date

Click here to enter text.

Amount of YOUR Gift
(Not Matching Amount)

Click here to enter text.

Employee's Name (Please Print) and Signature

Recipient Organization fills out this section

In 1-2 sentences please describe the educational context of the Organization, Fund, Program or Project listed above:

Click here to enter text.

I confirm that this organization is tax-exempt under IRC Section 501(c)(3) and is not a private foundation because it is described by IRC Section 509(a)(1) or (2), and is not a religious, political or fraternal organization. I further confirm that no economic or other benefit will accrue to the donor, to any member of his or her family, nor to any related third party as a result of this grant.

Click here to enter text.

Name & Title of Officer Authorized to Sign This Form (Please Print)

Click here to enter text.

Signature of Authorized Officer (Stamped Signature cannot be accepted)

Date

The Nellie Mae Education Foundation may suspend or terminate the program at any time at its sole discretion. The interpretation, application and administration of the program, including eligibility of charities, shall be determined by the Foundation, and its decisions shall be final. Grant requests take approximately 30 days to process. Because Matching Gift Grants are drawn from the annual grants budget, and unused funds cannot be carried over into a subsequent calendar year, payment must be made by the end of each calendar year. Accordingly, the deadline for sending a Matching Gift Grant request to the Grants Manager is November 30 for each calendar year.

Revised 4.9.09