



ORIX Foundation is committed to advancing education, strengthening communities and improving lives. We want children and families to succeed - in school, in the workforce and in life.

ORIX USA EMPLOYEE MATCHING GIFTS PROGRAM (page 1)

ORIX Foundation (the "Foundation") is an Internal Revenue Code Section 501(c)(3) public charity. The primary programs of the Foundation are (i) the Charitable Giving Program, through which the Foundation directly gives to partner charities and other charities consistent with the Foundation's mission statement, and (ii) the Employee Matching Program, through which the Foundation matches funds raised for, or donated to, certain charities by ORIX USA employees. The Foundation is proud that its Employee Matching Program has steadily grown, with more ORIX USA employees getting involved each year. In October 2009, the Foundation kicked off its first holiday charity campaign, benefiting the North Texas Food Bank. Through events like this, as well as involvement with partner charities, the Foundation hopes to continue to foster a charitable giving environment among ORIX USA employees, their families and the local communities where they live and work. For employees who want to make a donation and have their contribution eligible for a charitable contribution deduction and employer match, employees must make checks payable to ORIX Foundation, which may be used as discretionary funding for ORIX Foundation in support of its partner charities, or designated to a specific charity of the employee's choosing. In addition, ORIX USA is making available an option for automatic payroll deduction. This option would constitute an after-tax deduction from an employee's salary and the employee's contribution would be eligible for a charitable contribution deduction and employer match as well. Participation in any of these options is not mandatory and is completely at the discretion of the employee.	WHO CAN PARTICIPATE: Any person employed by ORIX USA for at least 6 months.	HOW THE PROGRAM WORKS: 1. Complete both PART A (Donor Information) and PART B (Recipient Information) on page 2 of this document 2. Supply any requested supporting documentation. 3. Return all information to the attention of: Lore Everingham Marketing Coordinator, HR Corp Services ORIX USA 1717 Main Street Suite 900 Dallas, TX 75201 You may also fax your request to 214-237-2043
	PROGRAM PROVISIONS: ORIX Foundation will match employee gifts ranging from a minimum of \$25 to a maximum of \$5,000 per fiscal year on a one-to-one basis. To be eligible under the terms of this program, an organization must be a 501(c)(3) tax-exempt entity as defined by the Internal Revenue Service in section 170 (b)(1)(A) of the tax code (http://www.irs.gov/app/pub-78). Additionally, donations raised for a qualified charity by an ORIX USA employee in connection with runs or other sporting events in which the employee is participating are eligible for a one to one match. This match is independent from, and in addition to matches of the direct dollar donation by an employee.	
	CONTRIBUTION ELIGIBILITY: A gift must be an actual contribution made, not pledged (payroll deductions will be distributed on a quarterly basis). Gifts must be in the form of payroll deduction or check made payable to ORIX Foundation. Match is limited to the portion of the donor's gift that is tax deductible. INELIGIBLE CONTRIBUTIONS: • Gifts made in lieu of tuition payment • Gifts to other Community Trusts, Foundations, United Way Federations, or other pass-through entities * • Gifts that provide a direct benefit to the donor, their family, or any other individual • Subscription fees for publications • Partisan political organizations or campaign contributions • Sectarian organizations whose services are limited to one religious group or include a missionary purpose • Trips or tours * EXCEPTION: Contributions made to these organizations for the purpose of funding disaster relief efforts	

ORIX USA EMPLOYEE MATCHING GIFTS PROGRAM (page 2)

PART A: DONOR INFORMATION (please check the appropriate box) TWO WAYS TO CONTRIBUTE: Payroll deduction: ☐ Effective with the next available pay period, deduct \$ _____ .00 per pay period Effective with the next available pay period, deduct a one-time amount of \$ _____ .00 from my regular pay Check: ☐ I am enclosing a check payable to the ORIX Foundation for \$ _____ .00 Employee Name: _____ Home Address: _____ _____ _____ Work Phone: _____ BENEFICIARY: ORIX Foundation; ☐ Other qualified charity ☐ Or ☐ Direct a portion of your gift to ORIX Foundation as well as to another charity: ORIX Foundation _____ % Other charity _____ % Date of gift _____ NOTE: If you would like to designate multiple outside charities, please complete both parts of this form for each qualified charity. Also, if you choose at any time to opt out of payroll deduction, please contact Debbie Douglass at X2233 for assistance.	PART B: RECIPIENT INFORMATION FOR ANY PORTION OF YOUR GIFT INTENDED TO BENEFIT A CHARITY OTHER THAN THE ORIX FOUNDATION, PLEASE PROVIDE THE FOLLOWING: CHARITY _____ PHONE _____ ADDRESS _____ _____ _____ Verification of charity's tax exempt status: Please contact your designated charity to request a copy of their W9 or 501 (c)(3) letter, and submit with this completed form. Donor Recognition: Please elect below whether or not you would like your personal information released to the outside recipient organization. If you choose not to make a selection, only your name will be released, and the charity will not be able to send you an acknowledgement of your gift. _____ Release my name and home address _____ Release my name only _____ I wish to remain anonymous _____ Employee Signature: NOTE #1: In addition to the above information, if the funds you are seeking to be matched are connected with a run or other charity event where pledges were collected, please provide a confirmation of receipt from the charity indicating the total amount you raised. NOTE #2: In addition to the above information, if the donation you would like matched will benefit an educational institution, please have that institution complete the required "Educational Institutional Letter". NOTE #3: In addition to the above information, we will match an employee's gift to a nonprofit that was directly paid by personal credit card, if the employee provides proof of receipt of that gift from the charity.
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