

# PAYDEN & RYDEL MATCHED GIVING APPLICATION

## FORM A

### GIFT TRANSMITTAL FORM

TO: \_\_\_\_\_  
Name of recipient institution or organization Date of gift (date gift transmitted)

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Enclosed is my personal gift of at least \$100, which consists of a check or proof of payment for \$ \_\_\_\_\_

This gift is  unrestricted  designated for: \_\_\_\_\_

Signature of Employee \_\_\_\_\_ Type or print employee's full name \_\_\_\_\_

### Home Address of employee:

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Employee's daytime telephone number \_\_\_\_\_

## FORM B

### RECIPIENT'S CERTIFICATION FORM

Upon receipt of the contribution with Forms A and B, please fill out the Recipient's Certification Form (Form B), and return this entire original Form (A and B) to the Matching Gifts Administrator, Payden & Rygel. The Company will match the donor's gift by sending a check directly to the eligible recipient organization.

TO: Matching Gifts Administrator, Payden & Rygel, 333 S. Grand Avenue, 32<sup>nd</sup> Floor, Los Angeles, CA 90071

The above described gift in the amount of \$ \_\_\_\_\_ received on \_\_\_\_\_

was made by \_\_\_\_\_  
Name of Payden & Rygel donor(s)

to: \_\_\_\_\_  
Name of recipient of organization

which I certify is  a fund, foundation or other qualifying charitable organization  an eligible cultural organization

an accredited elementary or secondary school or institution of higher education  an eligible hospital accredited by the Joint Commission on Accreditation of Healthcare Organizations

Accrediting association's name and address (*educational institutions only*) \_\_\_\_\_

**THIS SECTION MUST BE COMPLETED:** I further certify that contributions to the above recipient are charitable contributions as defined in section 170(C) of the Internal Revenue Code pursuant to unrevoked ruling of the Internal Revenue Service dated \_\_\_\_\_ (If no ruling has been obtained, please explain basis of certification as to contributions). If you have not previously provided a copy of this ruling to Payden & Rygel, please enclose it with this form. Hospitals should also send verification of accreditation.

Signature of President, Chief Financial Officer or other authorized officer of recipient \_\_\_\_\_

Print or type officer's name and title \_\_\_\_\_

Recipient's telephone number \_\_\_\_\_ Date certification is mailed to Payden & Rygel \_\_\_\_\_

# **PAYDEN & RYGEL'S MATCHING GIFTS PROGRAM**

## **PROGRAM GUIDELINES**

### Gifts

The gift must be made in the form of cash, check or bank transfer. The program requires a minimum contribution of \$100, with the maximum contribution(s) eligible for matching funds in one calendar year at \$5,000.

Gifts where goods or services are received in kind will not be matched by the firm (i.e., you give \$100 for a fundraising drive and you receive CD's, play tickets, etc. in return).

Payden & Rygel reserves the right at any time and in its sole discretion to determine whether a gift shall be matched and to change or terminate the Matching Gifts Program without notice.

### Donor Eligibility

Full-time employees of Payden & Rygel with continuous service during the six-month period preceding the date of the gift are eligible for the Matching Gifts Program.

## **ELIGIBLE ORGANIZATIONS**

### Educational Institutions

Any non-profit fully accredited primary, secondary or collegiate educational institution is eligible, including public schools, independent schools and specialized schools (i.e., schools for the disabled).

Gifts to schools for the construction of athletic facilities will be matched, but gifts to athletic departments for programs or scholarship are not eligible. Also ineligible are gifts matching tuition or dues.

### Cultural Institutions

Approved institutions include museums, libraries, performing arts organizations, historical societies, botanical garden, zoos, public broadcasting or similar charitable cultural organization.

### Hospitals

Eligible hospitals include any non-profit hospital accredited by the Joint Commission on Accreditation of Healthcare Organizations. An organization affiliated with an accredited hospital is also eligible; however, the check must be made to and received by the hospital and dispersed to the organization.

## **ADDITIONAL REQUIREMENTS**

### USA and Territories

Institutions must be located in the United States or in a U.S. territory or possession in order to be eligible for the program. Exceptions are made for the international organizations with offices located in the United States and which use moneys to benefit in the United States.

### Tax-Exempt Status

All approved institutions must be recognized as tax exempt by the Internal Revenue Service: most are listed in the Cumulative List of Organizations described in Section 170 of the Internal Revenue Code of 1986. However, for any institution that has not previously received a matching gift from Payden & Rygel a proof of tax-exempt status must be submitted.

### Ineligible Organizations

Payden & Rygel's Matching Gifts Program does not match gifts to civic organizations or organizations which are political in nature. Matching gifts to organizations involved in health care or health research (i.e., American Heart and Lung Association) are not permitted unless such organizations are affiliated with accredited hospitals. Human service agencies are not usually eligible; however, on occasion, exceptions may be made due to natural disasters.

### Gift Processing

Request for matching gifts must be submitted on Payden & Rygel's Matching Gifts Form. Requisite information such as tax-exempt status, accreditation, etc. must be provided and accompany the form.

## **INSTRUCTIONS TO EMPLOYEES:**

Complete Form A and mail entire form with your check to the recipient organization. The organization will complete Form B and return the fully completed form to Payden & Rygel.