

The P&G Fund Matching Gift Program for Higher Education Form

P&G Fund Record # _____

Use a separate form for each gift, even if making multiple gifts to the same institution on the same date.

Carefully read the Program Guidelines, type or print clearly, and answer all questions. Not doing so will delay processing and could result in a match not being approved.

The donor or the institution may be asked to provide additional information about this gift during processing or during periodic program audits.

PART A

TO BE COMPLETED BY ELIGIBLE DONOR & THEN MAILED TO INSTITUTION.

Be sure to include the Program Guidelines with this form.

1. DONOR'S STATUS: Employee Retiree Outside Director
2. EMPLOYEE / RETIREE PERSONNEL ID #: _____
3. NAME (Last, First, Middle Initial): _____
4. HOME ADDRESS: _____
5. CITY, STATE, ZIP CODE: _____
6. EMPLOYEE / RETIREE P&G LOCATION: _____
7. INSTITUTION GIFT GIVEN TO: _____
8. MONTH / DAY / YEAR YOU GAVE GIFT: _____
9. GIFT (\$25 U.S./\$40 CAN minimum; P&G Fund must receive completed form within one year of your gift date):
 Cash, check, or credit card charge amount: \$ _____
 Stock: a) Name of stock _____
 b) Number of shares _____
 c) Closing price per share on the date you gave gift \$ _____
 d) Source of this closing price _____
10. THIS GIFT IS:
 Unrestricted for an eligible academic use/entity of the institution's choice.
 Designated for the following academic use/entity which meets all Gift Eligibility requirements:

_____ Write out full name; do not use just initials or an account/ID number
11. ELIGIBLE DONOR'S SIGNATURE: _____

PART B

TO BE COMPLETED BY MATCHING GIFT OFFICER & THEN MAILED TO P&G FUND.

Do not write in or change any donor answers in Part A.

12. FICE #: _____
13. MATCHING GIFT OFFICER: _____
14. TITLE: _____
15. INSTITUTION: _____
16. MAILING ADDRESS: _____
17. CITY, STATE, ZIP CODE: _____
18. MONTH / DAY / YEAR GIFT WAS PROCESSED: _____
19. GIFT (\$25 U.S./\$40 CAN minimum; P&G Fund must receive completed form within a year of donor's gift date):
 Cash, check, or credit card charge amount: \$ _____
 Stock: _____ shares of _____
20. DID THE DONOR RECEIVE ANYTHING OF VALUE AS A RESULT OF THIS GIFT:
 No Yes - value of item: \$ _____ Item: _____
21. PER THE DONOR'S INSTRUCTIONS, THIS GIFT IS:
 Unrestricted for an eligible academic use/entity of our choice. We will use the donor's gift for: _____
 Designated by the donor for the following academic use/entity: _____
For Question #21, write out the full name; do not use just initials or an account/ID number. If the designation is a specific fund, campaign, program, class gift, etc., attach information about the specific purposes for which it is used. If it is a scholarship, attach the selection criteria.
By submitting this form you certify that no person or entity who provide materials or financial support for terrorism or directly or indirectly associated with terrorists will benefit from this gift.
22. MATCHING GIFT OFFICER'S SIGNATURE: _____

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OVERVIEW

1. The Procter & Gamble Fund will match 2:1 a gift in support of an academic purpose at an institution of higher education that meets all of the eligibility requirements detailed in these program guidelines.
2. The program operates as follows:
 - The eligible donor completes Part A of the form and mails it to the institution.
 - The institution's Matching Gift Officer completes Part B of the form and mails it to the Fund.
 - The P&G Fund sends both the donor and the institution a letter advising if a match is approved or not.
 - The P&G Fund sends the institution a single annual check in July that matches all requests approved during the current fiscal year from July 1 through May 31.
 - P&G operates on a July 1-June 30 fiscal year, but the P&G Fund closes program records at close of business May 31 in order to process the annual checks, letters, and summaries.
 - Requests received in June are held and processed after July 1.
3. P&G Fund Trustees may suspend, change or terminate the program at any time. Their decisions regarding interpretation, application, and administration of program provisions shall be final.
4. You reach The P&G Fund Matching Gift Program Staff via:
 - **Mailing address:** P.O. Box 599, Cincinnati, OH 45201
 - **Street address:** One Procter & Gamble Plaza, Cincinnati, OH 45202
 - **Fax number:** 513-983-2173
 - **E-Mail:** pgfund.im@pg.com

DONOR ELIGIBILITY

1. Eligible donors
 - Regular full-time P&G employees worldwide. There is no continuous service requirement.
 - Regular P&G retirees worldwide who were full-time when they retired.
 - Current and retired outside directors of The Procter & Gamble Company.
2. Anyone who does not meet the eligibility requirements above is not eligible.
 - This includes but is not limited to part-time P&G employees or the surviving spouses of deceased eligible donors.
3. A donor may be asked to certify eligibility or gift information.

INSTITUTION ELIGIBILITY

1. A U.S. or Canadian college/university is eligible if:
 - It has 501(c)3 tax-exempt status from the U.S. Internal Revenue Service or is operated by the Canadian government.
 - It confers associate, undergraduate, graduate, or professional degrees. If it confers only a degree unrelated to P&G's core business (e.g., theology, war), however, it is not eligible.
 - A U.S. college/university must also be accredited by one of the six regional accrediting associations; select post-graduate higher education programs may be accredited by a national accrediting agency recognized by the U.S. Secretary of Education.
2. A higher education organization (e.g., UNCF, HACU) is eligible if:
 - It has a 501(c)3 tax-exempt status from the U.S. Internal Revenue Service.
 - Its sole purpose is to raise and transmit tax deductible gifts directly to an eligible college/university for academic scholarships or other academic needs.
 - Each of its member colleges/universities meets all institution eligibility requirements.
3. Any institution that does not meet the eligibility requirements above is not eligible.
 - This includes but is not limited to pre-college institutions (high schools, junior high/middle schools, elementary schools, pre-schools, and day care centers) and institutions such as hospitals, radio and television stations, zoos, civic groups, cultural groups, etc.
4. An institution may be asked to certify eligibility or gift information.

GIFT ELIGIBILITY

1. The minimum eligible gift is \$25 U.S./\$40 CAN. The P&G Fund will match up to a cumulative total of \$5,000 U.S./\$8,000 CAN per eligible donor during any July 1 - June 30 fiscal year.
2. To be matched, both the donor's gift and the institution's use of the P&G Fund's match must be designated/used for an academic purpose listed as eligible and not listed as ineligible, as follows:
 - Eligible gift designations or uses of the P&G Fund's match include:
 - An academic entity responsible for a curriculum for which students receive academic credit (e.g., College of Engineering, School of Business).
 - An academic entity's campaign to raise money for academic needs (e.g., Law School Annual Fund).
 - A campus-wide fund to raise money for academic needs (e.g., John Doe University Annual Fund).
 - A radio or TV station if it is part of an eligible institution's academic curriculum and the gift is made through the academic entity responsible for it (e.g., College of Communications for WXYZ).
 - An academic scholarship with selection based on merit and/or financial need.
 - A campus library.
 - A class gift or reunion gift used for a specified academic purpose.
 - A capital campaign for an academic need (e.g., classroom building, classroom equipment, library).
 - A campus chapter of an academic honorary. A gift made directly to the honorary's national office is not eligible.
 - A member college/university of a higher education organization.
 - Ineligible gift designations or uses of the P&G Fund's match include but are not limited to:
 - Primary Research (original inquiry, related publications, bench work, etc).
 - A non-academic group, project, program, campaign, or purpose (e.g., campus beautification).
 - An alumni group, including a campaign, publication, or facility benefiting it and/or its members.
 - Athletics, including any related scholarship, program, project, or campaign.
 - A social fraternity or sorority, including any related scholarship, program, project, or campaign.
 - An extracurricular, social, religious, or political club, group, program, project, or campaign.
 - A denominational cause or fulfillment of a church commitment.
 - A donor's dues, social activity fees, subscription, or membership.
 - An individual or an individual's work, tuition, fees, or financial need/obligation.
 - An endowed Chair/Professorship.
3. An eligible donor may submit a matching gift request for a spouse's gift.
 - The eligible donor must complete and sign the matching gift form.
 - A spouse's gift is debited against the eligible donor's \$5,000 U.S./\$8,000 CAN fiscal year limit.
 - A gift from the surviving spouse of a deceased eligible donor is not eligible.
4. A gift must be the donor's personal contribution actually paid to an eligible institution via cash, check, credit card, or whole shares of securities having a quoted market value.
 - A gift may be paid through an eligible donor's charitable fund.
 - The closing price per share on the donor's gift date determines the value of securities.
 - Only the amount paid on a pledge can be matched. It is best to submit a matching gift form with each payment since the Fund must receive the form within one year of the donor's gift date.
 - A deferred gift or planned giving arrangement (e.g., insurance, charitable gift annuity) is not eligible.
 - An in-kind gift (e.g., value of personal property or services) is not eligible.
 - A gift submitted on behalf of an ineligible donor or group of ineligible donors is not eligible.
5. A gift must qualify as a charitable donation for income tax purposes.
 - A gift must not directly benefit the donor.
 - The Fund will not match the value of any consideration the donor receives as a result of a gift.
 - A gift in lieu of tuition, books, or other student financial obligations is not eligible.
6. The P&G Fund must receive the original matching gift request, with both Part A and Part B fully completed, within one year of the donor's gift date or a match will not be approved.