

*Working Together to Answer Community Needs*

**DONOR SECTION (Rexnord Employee)**

**This section is to be completed by the Rexnord employee (the donor). Please send your payment, along with this original form, to the organization you are donating to. Please print clearly. All requested information is required.**

EMPLOYEE NAME

RECIPIENT ORGANIZATION NAME

EMPLOYEE HOME ADDRESS

RECIPIENT CITY/STATE

EMPLOYEE CITY/STATE/ZIP

I certify that this is my own individual contribution. It is not payment for tuition, services, subscription, tickets, dues or other exclusions of the Rexnord Foundation.

REXNORD DIVISION / OPERATION or SUBSIDIARY and LOCATION

Enclosed is my payment for \$ \_\_\_\_\_

SIGNATURE OF REXNORD EMPLOYEE

Payment is in the form of:

- Cash
- Personal Check
- Credit Card
- Stock Transfer

DATE

**RECIPIENT SECTION**

**This section is to be completed by the organization receiving the gift. Please return this completed form to the Rexnord Foundation, P.O. Box 2022, Milwaukee, WI 53201-2022. Please print clearly. All requested information is required.**

I certify that this organization meets the nonprofit criteria established under section 501(c)(3) of the Internal Revenue Code. The gift received from the above Donor is a voluntary contribution. It does not represent in any way tuition or payment in exchange for, or in expectation of, significant services, fees or monetary benefits for the Donor or any organization or person affiliated with the Donor.

**PLEASE CHECK APPROPRIATE CATEGORY:**

- 509 (a)(1) Publicly supported charity
  - 509 (a)(2) Exempt Activity Supported Charity
  - 509 (a)(3) Supporting organization for 509(a)(1) or (2) charities. If 509(a)(3), please indicate which type:
    - Type I
    - Type II
    - Type III
  - 509 (a)(4) Public Safety Charity
- If Type III, please specify:**
- Functionally Integrated
  - Non-Functionally Integrated

RECIPIENT ORGANIZATION

RECIPIENT ADDRESS

RECIPIENT CITY/STATE/ZIP

FEDERAL TAX IDENTIFICATION NUMBER

RECIPIENT PHONE

SIGNATURE OF RECIPIENT ORGANIZATION OFFICIAL

NAME OF RECIPIENT ORGANIZATION OFFICIAL

TITLE

DATE

THE ORGANIZATION'S MISSION:

**Please enclose a copy of your IRS 501(c)(3) letter of determination. For all 509(a)(3) supporting organizations, please enclose all documentation required by internal revenue service notice 2006-109.**

## THE PROGRAM

The quality of life in our communities depends to a high degree on the strength of our many charitable, youth-serving, educational, cultural, medical, and civic organizations. In turn, these organizations look to the community for the financial support they need to provide their vital programs and services.

In 1964 the Rexnord Foundation adopted a Matching Gift Program to complement its direct giving program which was started in 1953. The purpose of the Matching Gift Program is:

- To encourage Rexnord employees to give significant support to worthwhile community organizations of their own choosing, and
- To provide added funds to a wide group of organizations while giving Rexnord employees a strong voice in how Rexnord Foundation funds will be distributed throughout their communities.

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## ELIGIBLE DONORS

- Active Employees of Rexnord Corporation
- Directors of the Rexnord Foundation

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## ELIGIBLE ORGANIZATIONS

Organizations in six categories are eligible for matching gifts. Each organization must be headquartered in the United States or Puerto Rico and must perform most of its work in these locations. In addition, all organizations must be tax-exempt under Section 501(c)(3) of the 1954 IRS Tax Code. Eligible organizations may receive up to \$20,000 a year in matching gifts. This ceiling excludes direct contributions from the Rexnord Foundation.

- **CHARITABLE** – providing human services and public information programs; i.e., for the elderly, for people with disabilities, day-care centers, etc.
- **YOUTH SERVING** – organizations that maintain ongoing programs for American youth such as Girl Scouts, 4-H, Boy Scouts, YMCA, Boys and Girls Clubs, YWCA, Junior Achievement, etc.
- **EDUCATIONAL** – the following institutions are eligible if they are recognized by the appropriate accreditation agency:
  - two- and four-year colleges
  - graduate and professional schools
  - technical schools
  - independent or parochial elementary and secondary schools (grades 1-12)Tax-exempt funds, foundations and associations that use their contributions to benefit a single education institution are also eligible.
- **CULTURAL** – professionally management organizations and institutions such as:
  - Museums (including historical restorations)
  - Performing and visual arts groups
  - Botanical and zoological societies
  - Literary societies
  - Service groups supporting cultural organizations
  - "Friends" groups that support cultural organizations, if the employee is not likely to recover more than 25% of his/her contribution through reduced admissions or other member benefits.
- **MEDICAL** – privately operated hospitals that are accredited by the Joint Commission on the Accreditation of Hospitals, and independently operated, non-hospital medical research foundations; e.g., American Cancer Society, American Heart Association, etc.
- **CIVIC** – local, regional and national organizations that are dedicated to improving the quality of life in our communities. Such organizations are frequently concerned with:
  - Public policy
  - Government administration
  - Ethics and morals
  - Law and taxation
  - Economic development and job training
  - Olympic support
  - Volunteering
  - Conservation and animal welfare

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## INELIGIBLE ORGANIZATIONS

Many worthwhile organizations are not eligible for legal or administrative reasons. The following kinds of organizations are ineligible for support through the Matching Gift Program:

- Political organization or groups whose major purpose is to influence legislation
- Veterans organizations
- Churches, synagogues or evangelical groups
- Technical and scientific societies and wildlife groups concerned with the propagation of a species
- Professional, athletic, fraternal or social groups
- Public elementary and secondary schools and parent groups that support public schools
- Government agencies providing services in any of our funding categories, including government operated hospitals and government funded medical research
- Urban renewal and rehabilitation groups
- United Funds, United Ways and other collectors of funds

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## INELIGIBLE GIFTS

The Foundation will not match the following employee contributions:

- To educational institutions for tuition, fees or personal expenses, or contributions made in lieu of such expenses
- For individual scholarships
- To athletic departments or programs
- To organizations from which the employee is likely to recover more than 25% of his contribution through reduced admission or other member benefits
- To adoption agencies when the employee gift is, in any way, involved in the adoption
- For memberships, dues or subscriptions
- To specific, individual Boy Scout or Girl Scout troops. However, donations made to the local headquarters office will be matched.

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## GENERAL POLICY

- The minimum qualifying gift is \$25 from a Rexnord employee.
- Effective November 1, 1990, the maximum amount eligible for matching is \$2500 per employee per the *Foundation's* fiscal year, which is *November 1 through October 31*. There is no limit to the number of organizations to which you may contribute.
- Your gift must be in the form of cash, a personal check (signed by you, a Rexnord employee), credit card, or stock transfer. The original signatures of both the Donor and recipient on the Matching Gift Form will serve as proof of the contribution.
- Employee gifts will be matched on a 1:1 basis; that is, if you contribute \$25, the Foundation will contribute \$25.
- Both your gift and the recipient organization must meet the guidelines outlined in this brochure.

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## HOW TO MAKE A GIFT

- Complete the Donor portion of the matching gift form. Send it with your check to the Recipient organization.
- The Recipient organization has the responsibility to complete the Recipient portion of the form and return it to the Foundation.

The Rexnord Foundation is responsible for establishing, interpreting, and implementing the policies of the Matching Gift Program. For various reasons, the Foundation may decide to make special "one-time" exceptions to the guidelines, disqualify an individual or organization from participation in the program, or change or discontinue the program. If you have any questions about the eligibility of your gift or the organization, contact the Foundation Administrator before making the gift.