



Roeslein & Associates, Inc. Employee Matching Gift Program Guidelines

Roeslein & Associates employees everywhere are contributing to our communities with service, leadership – and through charitable contributions. These partnerships help make better places for everyone to live, work, and grow. With the Employee Matching Gift Program, Roeslein & Associates supports employees in their efforts to improve the community.

MATCHING GIFT ALLOTMENT:

Roeslein & Associates, Inc. will match an employee's personal charitable contributions of cash (including check or credit card payments). The aggregate annual match per employee will be determined on a case-by-case basis. All dollar limits are based on the date of the employee's gift, not the date the matching gift is processed.

TO APPLY:

- Employees complete **Part A: Employee Application section** of the attached form, sign it, and **mail it to the nonprofit organization.**
- An appropriate financial officer of the organization then completes and signs **Part B: Gift Verification section** and mails the entire form back to the Roeslein Matching Gift Program.
- Matching gift requests must be received within 6 months of the gift date. Requests received after that will not be honored.
- After verifying eligibility, the form will be processed and a check will be sent directly to the organization.

EMPLOYEE ELIGIBILITY:

Employees are eligible for participation in the Roeslein Employee Matching Gifts Program six months from their initial hire date as a permanent full-time or part-time employee.

WHO IS NOT ELIGIBLE?:

All consultants, contractors, temporary employees, interns and those on long-term disability or salary continuance (severance) are not eligible.

ORGANIZATION ELIGIBILITY:

Community Organizations

Roeslein & Associates will match **fully tax-deductible** gifts to organizations that are tax-exempt public charities pursuant to IRS section 501(c)(3) located in the United States. Eligible organizations include the areas of: health and human services; arts and culture; environment; museums; public radio and television; zoos; food banks; and youth development programs.

Schools and Colleges

Roeslein & Associates will match **fully tax-deductible gifts** to an accredited public or private K-12 school, college (including junior college) or university that is tax-exempt pursuant to IRS section 501(c)(3) and located in the United States.

Ineligible Gifts and Organizations

Roeslein & Associates **will not** match the following:

- Gifts that result in the employee or a member of his or her family receiving a material benefit or service from the organization. Examples of these benefits include:
 - Tuition relief
 - Study, research or travel reimbursement
 - Extracurricular expense reimbursement
 - Dues for alumni, athletic or any other organizations or associations
 - Event admissions, tickets, or registration fees, including any fees for participation in a charity event
 - Admissions to dinners, lunches, or other gatherings
 - Preferential seating, parking, etc.

- Gifts that fulfill a prior obligation
- Items purchased at or donated to a silent auction, raffle or other fundraising event
- Gifts for political concerns or to organizations whose stated purpose includes lobbying, political activity, litigation, or advocacy
- Gifts to organizations whose primary purpose is religious, unless the organization is nondenominational in nature and benefits a broad range of the community (such as a soup kitchen or homeless shelter)
- Gifts to individuals or designated for the benefit of specific individuals
- Gifts to organizations whose activities represent a conflict of interest
- Gifts to any organization whose practices are not in keeping with the corporation's equal opportunity or diversity policies
- "Pooled" gifts, in which a number of employees or individuals combine gifts to form a "group donation" to a nonprofit organization. Each employee contributing to the organization must complete his or her own matching gift form.
- Employee contributions must be personal gifts that are actually paid, not merely pledged.

Roeslein & Associates, Inc. reserves the right to alter, suspend, or terminate the program and to determine the eligibility of organizations to receive funds. Roeslein also reserves the right to audit institutional records and documents pertaining to this program and to request any supporting donor documentation it considers necessary.



Roeslein & Associates, Inc. Employee Matching Gift Program Form

NOTE: Before completing this form, please review the guidelines and gift limitations. The Roeslein Board of Directors reserves the right to modify or discontinue this program at any time. The interpretation, application and administration of the provisions of the program shall be determined solely by the Roeslein Board of Directors and its decisions shall be final.

PART A – EMPLOYEE APPLICATION (to be completed by the EMPLOYEE):

Please complete this half and mail this form, along with the program guidelines, to the nonprofit organization.

Employee Name: _____ Title: _____ Hire Date: _____

Home Address (Number & Street): _____

City _____ State: _____ Zip: _____ Email: _____

Employee Owner Retiree

Date of Gift: _____ Amount of gift: \$ _____ Amount to be matched: \$ _____

Name of Recipient Organization: _____

Are you affiliated with this organization? Yes No

If Yes, in what capacity (check all that apply)? Board Member Financial Officer Fundraiser Volunteer

I certify that the information submitted is correct. I have read the program guidelines and my gift fully complies with the provisions of the program and is not being used for personal gain or in payment of any liability I may have to this organization or its affiliates.

I authorize the above-named organization to report this gift to Roeslein & Associates, Inc. for the purpose of applying for a matching gift.

Employee Signature: _____ Date: _____

PART B – NONPROFIT GIFT VERIFICATION (to be completed by the ORGANIZATION):

Please complete this half and return the entire form to Roeslein Matching Gift Program to APPLY for match.

REQUIRED: Attach a copy of your 501(c)(3) status letter from the IRS.

Name of Organization: _____ Federal Tax # (EIN#) _____

Address (Number & Street): _____

City _____ State: _____ Zip: _____ Phone: _____

Fax No.: _____ Email address: _____

Educational Institution Environmental Organization
 Arts/Cultural Organization Health/Hospital Organization

Date of Gift: _____ Amount of gift: \$ _____ Tax-deductible amount: \$ _____

I certify that the above-indicated fully tax-deductible gift has been received, that it will be used to support the primary objectives of the organization, and that it otherwise fully complies with the provisions of the program. I assert that this gift will not be used to pay any fees or in lieu of tuition or any personal obligation of the donor, and that this gift does not entitle the donor or a member of his or her family to any material benefit from our organization. I further assert that neither this organization nor its affiliates are in any way involved in terrorist financing, money laundering, or any other type of illegal activity.

Name (please print): _____ Title (please print): _____

Authorized Signature: _____ Date: _____

After this form has been completed and signed by donor and organization, the organization must mail this form along with a copy of your 501(c)(3) status letter from the IRS **within 90 days** from date of gift to:

Roeslein & Associates, Inc.
Matching Gift Program
9200 Watson Road, Suite 200
St. Louis, MO 63126-1528

Do not add Roeslein & Associates, Inc. to your mailing list or any third party mailing lists.