Matching Gifts

The Sallie Mae Fund
Sallie Mae Employee Contribution Program

Guidelines

Eligible Organizations
All organizations must be located in the United States or one of its possessions, must be recognized by the Internal Revenue Service (IRS) as tax-exempt under Section 501(c)(3) of the Internal Revenue Code, and classified as a public charity under Section 509 (a) of the Internal Revenue Code, or as an instrumentality of a state or local government as provided by 170(c)(1) of the Code.

Eligible Donors
In order to receive matching contributions, donors must be eligible for Sallie Mae’s benefit programs and have at least three months of service. Retirees are not eligible to participate.

Contribution Limits
The Sallie Mae Fund will contribute two dollars for each dollar contributed to an institution of higher education by the employee up to a total Sallie Mae Fund contribution of $10,000 per year. The Sallie Mae Fund will contribute one dollar for each dollar contributed to a primary or secondary educational institution or a civic community, health or human services organization by the employee up to a total Sallie Mae Fund contribution of $5,000 per year. The Sallie Mae Fund will contribute one dollar for each dollar contributed to an arts, cultural or environmental organization by the employee up to a total Sallie Mae Fund contribution of $2,500 per year.

Notwithstanding the above limits per category, aggregate matching contributions by The Sallie Mae Fund are limited to $10,000 per employee in any single plan (calendar) year. Contributions will be posted against the $10,000 limit based on the date on which the employee’s gift was mailed.

For contributions made in stock, The Sallie Mae Fund will calculate the value of the matching gift based on the closing price of the stock on the date of the gift. The Sallie Mae Fund will match only gifts of stock of publicly traded companies.

Higher Education (Match 2:1)
- Accredited two-year or four-year public or private colleges, universities, graduate or professional schools.
- Higher education scholarship programs managed by a non-profit organization.

Primary and Secondary Education (Match 1:1)
- Pre K-12 public and private schools.
- Pre K-12 scholarship programs.

Health and Human Services Organizations (Match 1:1)

Civic and Community Organizations (Match 1:1)

Arts and Cultural Organizations (Match 1:1)

Environmental Organizations (Match 1:1)

Ineligible Gifts
- Contributions which result in the donor or family member receiving a tangible return including goods or services (e.g. dinner, subscriptions, raffles, prizes, sporting event tickets, participation in golf tournaments, memberships, etc.);
- Contributions made to fulfill legal obligations of the donor;
- Contributions made by a spouse or partner;
- Contributions to religious organizations whose program’s principal purpose is to promote a particular faith, creed or doctrine;
- Payments for tuition, books, student fees;
- Contributions to political organizations, causes or campaigns;
- Dues to alumni groups, clubs, fraternities, sororities, etc.;
- Funds collected from others and submitted by an eligible donor to be matched;
- Gifts-in-kind, other than securities;
- Deferred gifts (e.g. annuities, charitable remainder trusts, etc.), bequests and insurance premiums that name the organization as beneficiary; and
- Any other contribution not permitted by law to be matched.

The Sallie Mae Fund, in its sole discretion, reserves the right to audit, amend or decide in its sole discretion any questions of eligibility under the Matching Gifts Program.

Administration
- Contributions must be at least $25.
- Forms must be processed within one year of the date of the gift. After one year, the gift is no longer eligible for matching.
- Matches will be processed and paid quarterly, after receipt of the form from the charity. Completed forms received from the charity will be batched and processed as follows:
  - Received by: 3/31 6/30 9/30 12/31
  - Processed by: 4/30 7/31 10/31 1/31

The original signature of the organization’s representative must be included on part 2 of the attached form.

For additional information:
Call: 1-877-756-8513 (toll free)
Fax: 1-609-799-8019
E-mail: salliemaefund@easymatch.com
Part I - To Be Completed By Donor

Complete Part I and forward to recipient organization.

For questions or additional Matching Gifts forms please call 1-877-756-8513 (toll free).

Please indicate your position:

☐ Employee
☐ Officer of Sallie Mae
☐ Director of SLM Corporation

Donor ID Number

Donor Name

Donor Address

City State Zip

Daytime Phone

Gift Date

Match Ratio - 2:1, 1:1

☐ Enclosed is my check for $______________
☐ Enclosed is my receipt for an online donation of $______________
☐ Enclosed is my gift of _____shares of __________ stock
☐ I do not have a receipt. I made a phone donation on _______ for $__________

Name of Recipient Organization

City/State of Recipient Organization

Program and/or Employee Designation, if any (e.g. Business School, name of AIDS Ride team member, etc.):

Donor: complete Part I and send to recipient organization. Recipient organization: complete Part II and send completed form with 501(c)(3) certification to:

The Sallie Mae Fund
Sallie Mae Employee Contribution Program
Matching Gifts
Box 8498
Princeton, NJ 08543-8498

Employee Signature Date