

**Part I: To be completed by donor.**

Please complete Part I and forward the entire form with your donation to the recipient organization.

Employee  Director

Full Name (please print)

State Street Employee ID Number

Start Date (MM/YYYY)

Interoffice Address

Work E-mail Address

Work Phone Number

Recipient Organization

Contribution Amount

Match Amount (if different)

Contribution Date

Form of Gift (check one):

Cash/Check

Securities ( \_\_\_ shares of \_\_\_\_\_ )

Credit Card

I hereby certify that the above information is correct and that this is a voluntary contribution given from my own personal funds that fully complies with the provisions of the program described herein. I am eligible to participate in the Matching Gift Program and authorize the recipient organization to report this gift to the State Street Matching Gift Program for the purposes of applying for a matching donation. Neither I, nor any member of my family, nor any related third party, will derive any benefit from this gift. I further certify that this contribution is not in lieu of tuition, fees or other personal obligations. Failure to comply may result in suspension of gift matching privileges. Further, I authorize collection, disclosure to and use of the information presented on this form by a third-party service provider, contracted by State Street Corporation, for the purpose of verifying eligibility as a program participant and complying with legal and tax regulations.

Signature

Date

**Part II: To be completed by organization.**

Please mail with all required attachments to:

State Street Matching Gift Program

P.O. Box 8377

Princeton, NJ 08543-8377, USA

Organization's Legal Name

EIN Number (US organizations) or  
Agency Registration Number (non-US organizations)

Mailing Address

City

State/Province

Zip/Postal Code

Country

Contact Person's Name

Title

Fax

E-mail

Website Address

**Check here if the majority of clients served are low- to moderate-income**

**Required Attachments for Charities:**

If this is your first matching gift request to the State Street Matching Gift Program, please enclose proof of charitable tax status (IRS 501(c)(3) determination letter for US organizations), mission statement and description of programs.

I confirm that no benefit will accrue to the donor, any member of the donor's family, or any related third party as a result of this gift. This gift will not be counted as part of a donor contribution in the calculation of his or her level of contribution (i.e., president's circle, etc.). I also certify that this contribution is not in lieu of tuition, fees or other personal obligations, and that this organization is in full compliance with the anti-terrorism laws legislated by the USA Patriot Act. In addition, by countersigning this GiveMore application, I agree that this organization will not promote or engage in violence, terrorism, bigotry or the destruction of any state, nor will it make sub-grants to any entity that engages in these activities. Failure to comply may result in suspension of gift matching privileges. I am authorized to attest to the above statements and have sufficient knowledge to do so.

Title

Signature

Date



**GiveMore Donations**

The State Street Foundation, Inc. will match one-for-one contributions made by eligible participants to eligible charitable and/or educational institutions based on the following limits: \$25,000\* for board of directors, CEO, president and vice chairs; \$15,000\* for executive vice presidents and senior vice presidents; \$5,000\* for all other employees.

**Eligible Participants**

- Active employees of State Street Corporation (and its wholly owned subsidiaries) who have served for 12 months
- Current directors of State Street Corporation

Note: Spouses and surviving spouses of eligible employees, temporary employees, interns or contract workers are not eligible to participate.

**Types of Gifts Matched**

- Cash, personal check, credit card
- Tradable securities

**Eligible Organizations**

All recipient organizations must have a charitable purpose, operate on a not-for-profit basis and be determined to be tax-exempt by local tax authorities.

**US Charitable and Educational Institutions**

- Nonprofit organizations located in the US and recognized by the US Internal Revenue Service as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS Code or as an instrumentality of a federal, state or local government as provided by Section 170(c)(1) of the IRS Code.
- Schools located in the US must be accredited by one of the six nationally recognized accrediting commissions or one of the affiliates of the National Association of Independent Schools.

**Non-US Charitable and Educational Institutions**

- Only those organizations vetted and approved by The Charities Aid Foundation on behalf of State Street's Matching Gift Program are eligible to receive matching gifts.

**State Street Foundation will not match:**

- Gifts to United Way, United Way chapters, Give As You Earn Giving Schemes, or gifts made through other similar payroll deduction programs
- Gifts to fulfill a person's pledges, tithes or other church-related financial commitments
- Gifts to private foundations or donor-advised funds
- Gifts to organizations whose primary purpose is sectarian, religious or political
- Gifts to individuals or fraternal, political, military, veteran or labor organizations
- Gifts to clubs, professional associations, alumni associations or scholarship funds
- Gifts to organizations that may involve State Street in controversial public issues
- Registration fees associated with fundraising events, subscription fees for publications or payments for tickets for benefit functions
- Any payments that are not direct gifts to a charitable institution, e.g., payments for auction merchandise
- Gifts of real or personal property
- Gifts to organizations from which the donor or the donor's family receives a direct personal benefit
- Cumulative gifts from several individuals reported as one contribution
- Gifts to non-US charities that have not been approved for funding by Charities Aid Foundation

\*Or non-US currency equivalent.

**Policies and Procedures**

- Matching ratio is 1:1
- Minimum gift eligible is US \$50. For installment gifts, each match request must be submitted separately and meet the US \$50 minimum gift requirement.
- There is a US \$1,000 combined program cap for the DoMore and CollectMore components of State Street's Matching Gift Program and that \$1,000 counts toward the overall annual maximum donor limit. If the donor applies for several contributions, gifts will be matched in the order received, up to the maximum annual donor limit for the calendar year.
- The donor's limit is based on the date of the gift. State Street's Matching Gift Program runs on a calendar year. Individual grant requests apply against the calendar year program cap in which the donation was made.
- Gifts must be made by the donor through personal funds to the qualified organization, not merely pledged.
- No double-counting. Requests for contributions can be matched by only one component of the Matching Gift Program. Requests made under the GiveMore component cannot also be included in another employee's CollectMore request for matching.
- Matching contributions for US organizations will be sent directly to the eligible organization requested by the donor and approved by State Street Foundation.
- Matching contributions for non-US organizations will be sent directly to the organization recommended by the donor and State Street Foundation and approved by Charities Aid Foundation.
- The Matching Gift Program matches contributions made by eligible State Street employees and directors on a first-come, first-served basis.
- State Street Foundation may suspend, amend or discontinue the Matching Gift Program, or any component thereof, at any time and reserves the right to determine in its sole discretion whether a grant application meets the eligibility criteria set forth herein, and its decision shall be final.
- The Matching Gift Program has an annual overall budget and State Street Foundation reserves the right to pro-rate or decline awards if or when the overall participant demand exceeds the annual program budget.

**Instructions to Donor**

- Complete the donor's portion of the attached form and mail the entire form with your donation to the organization.
- When your gift is received by the organization, it will complete the form and return it to the State Street Matching Gift Program.
- The State Street Matching Gift Program cannot process forms that are incomplete or contain incorrect information. Incorrect or incomplete forms will be delayed until all necessary information is obtained.

**Instructions to Organization**

- Complete and sign the organization's portion of the form. An original signature is required.
- Proof of charitable tax status is required the first time a grant is requested. Please enclose a copy of the IRS 501(c)(3) determination letter (for US organizations only), the organization's mission statement and a description of programs. US government agencies, such as public schools and community libraries, should submit other proof of charitable tax status.
- Send the entire form with the required attachments to the State Street Matching Gift Program for processing. Faxed copies of this form will not be accepted.



# STATE STREET

**Contact Information**

State Street Matching Gift Program  
P.O. Box 8377  
Princeton, NJ 08543-8377  
USA

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+1 866 632 1411  
www.easymatch.com/statestreet  
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