



Matching Gifts Program Guidelines

To encourage and support the generosity and community involvement of employees, Swarovski offers the Swarovski Matching Gifts Program, which provides matching funds to the charitable organizations employees personally support. To maximize the impact of employee charitable giving, Swarovski matches, dollar for dollar, donations made by eligible employees, up to \$150 per year, to eligible nonprofit organizations or educational institutions of their choice.

WHO CAN PARTICIPATE?

Active, full-time Swarovski Holdings U.S. Limited employees, with 30 days of continuous service. Gifts from Spouses or Surviving Spouses are not eligible.

WHICH INSTITUTIONS QUALIFY TO RECEIVE MATCHING FUNDS?

Nonprofit organizations must be located in the United States or one of its possessions and recognized by the 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 Code:

Eligible organizations include:

EDUCATIONAL

- **Educational Institutions** – college level, junior colleges and private secondary schools (grades 9 through 12 only) accredited by one of the six accrediting agencies. Public high schools (grade 9 through 12) are eligible only if the school has an established foundation to receive funds on behalf of the school
- **Alumni funds**

CULTURAL

- **Performing arts groups** such as orchestras, theaters, opera and dance companies, and performing arts and cultural centers.
- **Arts councils and united arts funds**
- **Historical societies** and historic preservation organizations.
- **Museums** of art, history, or science, planetariums, botanical gardens.
- **National educational (public) television** and radio stations listed in the Corporation for Public Broadcasting Directory.
- **Libraries**

HEALTH

- **National agencies** meeting the standards of philanthropy including March of Dimes, Red Cross, etc.

ENVIRONMENTAL

- **U.S. organizations** protecting the environment, conserving natural resources and habitat and protect national wildlife.
- **Zoos** – open to the public.

WHAT CONTRIBUTIONS ARE ELIGIBLE?

- Must be a personal gift, from the donor's personal funds, which has been paid and not simply pledged. The minimum tax-deductible gift eligible for matching is \$25. For gifts in the form of installments, each installment must be submitted on a separate form and meet the \$25 minimum gift requirement.
- The maximum amount matched per donor per calendar year is \$150 on a dollar for dollar basis. If the donor makes several contributions, gifts will be matched in the order received, up to the maximum limit for the calendar year. Unused matching contributions do not carry over into the next year.
- Gifts must be personal contributions made directly to approved institutions.
- The donor's limit is based on the date of the gift.

- Gifts must be in the form of check, or credit card. No other form of personal or real property will be matched.

WHAT IS NOT ELIGIBLE FOR MATCHING?

- Gifts made by Community Trusts or similar organizations, including Charitable Remainder Trusts, Donor Advised Funds, or Family Foundations.
- Gifts made in lieu of tuition payment for services
- Fees for service or tuition payments
- Membership fees for which benefits are received
- Dues to alumni(ae) or similar groups
- Gifts or payments for primarily political or religious purposes
- Subscription fees for publications
- Insurance premiums
- Bequests or life income trust arrangements
- Gifts of real or personal property
- Cumulative gifts from several individuals reported as one contribution

HOW THE PROGRAM WORKS

The employee should:

- Complete Part 1 of the form.
- Mail the *original* form, with the donation and any other necessary documentation, to the institution of your choice that meets the criteria listed in the guidelines. (Faxed copies will not be accepted.) The matching amount provided by Swarovski will be for unrestricted support.

The recipient organization should:

- Complete Part 2 of the *original* application form.
- The authorized officer of the charity must verify the donation, sign the application and return the *original* form to the Swarovski Matching Gifts Program, P.O. Box 2236, Princeton, NJ 08543-2236.

Eligible gifts are processed and matched to institutions on the following quarterly schedule.

Received By:	3/1	6/1	9/1	12/1
Processed By:	3/31	6/30	9/30	12/31

IS THERE A TIME LIMIT FOR MATCHING MY GIFT?

Gifts must be registered within one year of the date of payment by check or credit card. Gifts registered after that time will not be eligible. All gifts must be verified by the recipient institutions in order to be matched by Swarovski.

For more information, please contact the Matching Gifts Program via phone at 1-(866)-272-4496.

ADMINISTRATIVE CONDITIONS

Swarovski reserves the right to suspend, change, revoke, or terminate the Matching Gifts Program at any time. Additionally, the Foundation shall be the sole judge as to the eligibility of institutions, and gifts. The interpretations applicable and the administration of this program shall be determined by Swarovski and its decision shall be final.



Matching Gifts Program Request Form

INSTRUCTIONS

Donor:

- ◆ Complete Part 1 of this form – one for each gift. *Please print or type.*
- ◆ Send the form and a copy of the program guidelines with your contribution to the recipient organization.

Recipient Organization:

- ◆ Verify receipt of gift.
- ◆ Complete Part 2 of this form. *Please print or type.*
- ◆ If this is your first matching gift request to the Swarovski Matching Gifts Program, please enclose a copy of your Internal Revenue Service 501(c)(3) IRS determination letter and a brief description of your organizations primary mission statement or purpose.
- ◆ Forward form to the address printed below.

PART 1 - DONOR SECTION

EMPLOYEE ID NUMBER

EMPLOYEE NAME

HOME ADDRESS

CITY/STATE/ZIP

BUSINESS TELEPHONE, INCLUDING AREA CODE

E-MAIL ADDRESS

EXACT DATE OF GIFT

\$ _____ \$ _____
AMOUNT OF GIFT (MIN \$25) AMOUNT TO BE MATCHED (MIN \$25)

Type of gift: Please check one:

Check Credit

NAME OF ORGANIZATION

ORGANIZATION CITY, STATE

RESTRICTION OR PURPOSE (IF ANY)

I certify that neither my family nor I will derive any direct or indirect financial or material benefit from this contribution. I authorize the above-named recipient organization to report this gift to Swarovski for the purpose of applying for a matching gift. I certify that my gift is a voluntary contribution, that it fully complies with the provisions of the program described herein, and does not represent in anyway a fee for a service or benefit. I have read and understood the guidelines of the Swarovski Matching Gifts Program.

DONOR SIGNATURE

DATE

PART 2 - RECIPIENT ORGANIZATION SECTION

EMPLOYER IDENTIFICATION NUMBER (EIN)

ORGANIZATION NAME

ADDRESS

CITY/STATE/ZIP

TELEPHONE, INCLUDING AREA CODE

FAX, INCLUDING AREA CODE

E-MAIL

WEBSITE ADDRESSES (IF ANY)

DATE GIFT RECEIVED

\$ _____ \$ _____
AMOUNT OF GIFT TAX DEDUCTIBLE GIFT AMOUNT

I hereby certify that this organization/program meets the eligibility requirements of the Swarovski Matching Gifts Program, and that neither the donor nor Swarovski will derive any personal material benefit from this gift or match.

AUTHORIZED OFFICER'S NAME (PLEASE PRINT)

TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZED OFFICER

DATE

MAIL COMPLETED FORM AND ANY REQUIRED ENCLOSURES TO:

Swarovski Matching Gifts Program
P.O. Box 2236
Princeton, NJ 08543-2236

Phone: 1-(866)-272-4496

E-mail: Swarovski@easymatch.com