



## [Matching Gift Program](#)



[Guidelines](#)

[FAQ](#)

Guidelines

### **Introduction**

The UBS Matching Gift Program enables us to join our employees in supporting the communities in which they live, and the institutions and organizations of greatest importance to them. We match donations to eligible U.S. institutions dollar-for-dollar, up to an aggregate of \$2,500 per employee, per calendar year.

### **Eligible Employees**

Full and part-time U.S. employees of the following businesses are entitled to participate in the Matching Gift Program: Corporate Center, Global Asset Management, Investment Bank and targeted Global Wealth Management & Business Banking.

### **Eligible Organizations**

Eligible organizations must be located in the U.S. or one of its possessions and be recognized by the Internal Revenue Service as tax-exempt and designated a public charity under section 501(c)(3) of the Internal Revenue Code or an instrumentality of a federal, state or local government under Section 170 (c) of the Code. The organization must have no political affiliation and must be open to full nondiscriminatory participation. Examples of eligible organizations may include:

- **Education**

Accredited public and private colleges and universities (except theological schools and seminaries), two-year colleges, graduate and professional schools, and publicly and privately supported primary and secondary schools. Tax-exempt alumni funds, foundations and associations whose exclusive purpose is to support these educational institutions may also be eligible.

- **Culture**  
Visual, performing and literary arts groups, public radio and television stations, museums, historical societies and zoos may also be eligible.
- **Health and Human Services**  
Organizations that provide health care services, conduct medical research or provide services to individuals with special needs are eligible (i.e., Visiting Nurses Association, American Cancer Society, United Way).
- **Civic**  
Organizations that promote the well-being of the community, such as the Urban League, volunteer fire departments, and humane societies may also be eligible.

### **Ineligible Organizations**

Any organization whose activities discriminate with respect to race, color, religion, gender, age, sexual orientation, national origin, ancestry, marital status, veteran status, medical condition or disability is ineligible for a matching gift. UBS will not give matching funds to any charitable organization designated by the U.S. Treasury Department's Office of Foreign Assets Control as Specially Designated Nationals or Blocked Persons.

The Matching Gift Program will not contribute matching funds to political parties or candidates; political advocacy groups; theological schools and seminaries; religious organizations; professional, social, service, fraternal or athletic associations or booster clubs; or political advocacy groups sponsored by eligible organizations.

### **Ineligible Gifts**

Donations that fund services, tuition, books, student fees, nonscholastic programs, subscriptions, insurance premiums or bequests, tickets, membership or alumni dues, or any contribution that provides benefits to a given employee will also be ineligible for matching funds.

Other gifts ineligible for matching funds include: gifts made jointly by several individuals, gifts from spouses or other family members; gifts to fulfill pledges, legal obligations or other financial commitments; gifts to private or family foundations or memorial funds that do not have a 501(c)(3) status; and gifts of goods or materials.

### **Program Guidelines**

UBS will match approved donations by eligible employees to eligible organizations dollar-for-dollar, up to an aggregate of \$2,500 per employee, per calendar year. The minimum employee donation eligible for matching is \$50. Employees must apply for matching funds within one year of the date of the gift. The start date for consideration is an employee's date of employment.

As with all personal securities transactions, pre-approval is required through UBS's ETWEB process

The Matching Gift Program may be suspended, amended or discontinued at any time without prior notice. UBS reserves the right to determine whether any gift will be matched and all decisions are final.