

Matching Gift Program



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The Gift Matching Process

- An eligible participant makes a contribution to an eligible non-profit organization.
- The donor registers a matching gift request with AllianceBernstein using this Internet site.
- Third party Matching Gifts vendor or the AllianceBernstein Foundation contacts the recipient organization to confirm that it has received the eligible participant's gift and also validates that the charity is an eligible entity under the program. Please be advised that the AB Foundation has different criteria than the Third Party Matching Gift vendor to validate the charity's eligibility.
- Following receipt of verification by the recipient organization, the gift will be approved for payment. Matching gifts are paid on a quarterly basis to the charities for gifts approved in the previous quarter.
- Gifts must be registered for matching **within one year** from the gift-giving date.

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Amounts Matched

• Minimum Amount:	\$25 per gift
• Maximum Amount:	The total annual maximum gift amount(s) that will be matched is \$5,000 per calendar year for all eligible employees.

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Eligible Participants

- All active full-time or regular part-time employees of AllianceBernstein.

- A full-time or regular part-time employees of AllianceBernstein on an approved leave of absence.
- A spouse or same-sex/opposite-sex domestic partner may also participate on behalf of the eligible employee.

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Ineligible Participants

- Temporary employees
- Consultants
- Retirees

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Eligible Organizations

Any civic, cultural, health and human service organization recognized as a 501(c)(3) or 170(c) public charity by the Internal Revenue Service, including most colleges and universities. Private schools with a 501(c)(3) designation and all public schools including day care and K12 are also eligible. Organizations classified as private foundations are not eligible. AllianceBernstein will match gifts to qualified institutions affiliated with religious organizations, but will not match gifts made directly to religious organizations. You may verify an organization's IRS status through the Guidestar Web site at <http://www.guidestar.org/>.

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Eligible Gifts

- Personal contributions actually paid, not merely pledged, to an eligible nonprofit institution in support of its primary objective made in the form of:
 - Cash
 - Check
 - Credit Card
 - Securities having a quoted market value. The value of securities will be the closing market value based on the gift date.
- Gifts that are designated to a particular program or fundraiser for an eligible organization. For example, if your original contribution to State U. was designated for the volleyball team or to sponsor Jane Athlete in a bike-a-thon, just enter that designation in the space provided on this Internet site. The tax-deductible portion of tickets purchased to attend fundraising events for eligible nonprofit institutions.

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Ineligible Gifts

- Pools of gifts collected from multiple employees (often for fundraisers). Instead, each employee should register his or her own matching gift requests.
- Non-cash gifts, real or personal property or personal services e.g., works of art, rare books or donated labor.
- Gifts to be used for religious or other sectarian purposes. Note: Gifts to sectarian organizations may be matched at AllianceBernstein's discretion, if the organization uses the funds primarily to benefit people outside of its own membership. For example, gifts to a church soup kitchen that serves the general public will be considered for matching, while gifts to a church building fund will not.
- The value of subscriptions, substantial premiums and other benefits that are associated with a class of membership established by a nonprofit organization. Only the tax-deductible portion of such membership qualifies for a matching gift.
- The non-tax deductible portion of tickets purchased to attend fundraising events for eligible nonprofit institutions.
- Gifts that support political parties or candidates.
- Private foundations
- Donor Advised Funds

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