

Barclay's Global Investors Matching Gift Program

BGI employees can have up to **US\$5,000** (or local equivalent) matched for charitable donations as part of BGI's Matching Gift Program.

While the maximum amount BGI will match on an annual basis is **US\$10,000** (or local equivalent) employees can now direct up to **US\$5,000** (or local equivalent) of that total toward matching charitable donations. The remaining **US\$5,000** would be designated for educational matching. Employees still have the option of matching up to **US\$7,500** (or local equivalent) for educational donations and the remaining **US\$2,500** for matching charitable donations as long as the total match request doesn't exceed **US\$10,000** (or local equivalent).

Matching Gift amounts depend on the program. Following are the minimum and maximum amounts that apply to each (all amounts are USD):

Program	Minimum	Maximum
Charitable Donations*	\$25	\$5,000
Educational Donations*	\$25	\$7,500
Fundraising	\$25	\$1,000
Volunteering	40 Hours	\$500

*Not to exceed the annual BGI matching gift limit of \$10,000 per employee

1. Charitable Matching

This program supports donations made by BGI employees to charities with their own money. To qualify for matching, donations must be at least US\$25. As mentioned earlier, employees can now choose to have up to \$5,000 matched for charitable donations.

Limitation of Charitable Donations Program

If you make a donation to a charity for which a BGI employee is raising funds, please be aware that you **CANNOT** submit a matching gift request for that donation if the fundraising employee is requesting a fundraising match (see below). This rule was implemented to avoid matching the same donation twice.

2. Fundraising

This program supports the charitable fundraising efforts of BGI employees by matching amounts raised one-to-one. To qualify for matching, you must raise at least US\$25. The maximum request for a fundraising match is US\$1,000. Employees can request a fundraising match up to three times annually. This matching gift request does not affect the individual matching gift limits of US\$10,000.

Limitations within the Fundraising Program:

If you are participating in the Fundraising Program and you receive donations from BGI employees, you may submit a matching request for the funds you raised, up to US\$1,000. However, the employees who contributed to your cause may NOT submit matching requests under the Charitable Donations Program. This rule was implemented to avoid matching the same donation twice.

3. Volunteering

Cash Donations

Employees donating time to charitable organizations are eligible to request a BGI donation to the specific

charities.

Eligibility – Any full or part-time employee who donates at least 40 hours of their time in a calendar year to a charitable organization can apply for a US\$500 grant per organization each year.

Taking Time-Off to Volunteer

If you are involved in a volunteer activity which may require time off from work (the AIDS ride from San Francisco to LA, for example) you are eligible for up to 16 hours of paid time-off to participate in the volunteer activity. This policy was established to support employees actively involved in community activities without asking them to use vacation or personal time to participate in volunteer events.

There is no formal procedure in place to request this time off. It is simply an agreement between the employee and his/her manager. There is no paperwork to submit.

In addition, BGI employees can earn one **Community Support Day Off** each calendar year to be used the following calendar year by volunteering six hours or more of your time to a charitable cause or causes. If volunteer time is accrued by volunteering at iCare sponsored activities, hours are tracked and forwarded to the corporate giving contact by the event coordinator. If time is donated to charities outside of BGI sponsored activities, please provide a written letter on the charity letterhead or contact number for verification of the volunteer hours.

Team Volunteering

This program provides financial support to cover administrative costs associated with group volunteering activities (i.e., team event registration costs, t-shirts, hats, banners and other small promotional items). Teams must consist of at least five full-time BGI employees. This program will grant a maximum of US\$300 per group.

To apply for team volunteering, send an email to your office contact, who in the US is Lara DellaRocca. Please include a description of the event, when it is taking place, who the members of your team are, and how much money you are requesting.

4. Educational Matching

This program supports employee donations to educational institutions around the world. To qualify for matching, donations must meet a minimum of US\$25. All generally recognized accredited educational institutions are eligible to receive matching. Gifts should be to a specific school or funds for the benefit of a specific school such as alumni funds, rather than to consortia or school districts. All recipient institutions (including foreign affiliates) must be non-profit, tax-exempt organizations as recognized by the [Internal Revenue Service](#).

5. Who Is Eligible To Apply?

Any Barclays Global Investors full-time or part-time employee who has been employed with the firm for at least 3 continuous months.

6. Sorry, our program doesn't accommodate matches for the following:

- Temporary employees, contractors or consultants.
- If the charitable status of the organization that you have made a donation to is questionable or the association with the charity poses a reputational risk to the firm.
- Raffles, conferences or religious organizations promoting their own beliefs. However, entirely secular community service programs, which have their own budget, sponsored by religious organizations are acceptable.

- Political parties or candidates running for office.

If a matching request is denied both the donor and the recipient organization will be informed, via email, within 5 days following processing.

7. Which Institutions Are Eligible?

All recipient agencies must be considered an eligible recipient of charitable donations by either the [U.S. Internal Revenue Service](#), or [Revenue Canada](#). Educational institutions must be accredited by a recognized regional accrediting commission. Also, donations to an educational institution must be to a specific school. Donations to school districts, educational consortia, etc., are not considered donations to a specific school.

Email barclaysgi@matchgift.com
Address **2793 SE Monroe**
 Stuart, FL 34997
Telephone No. **(877) 518-4438**
Fax No. **(772) 283-2093**
Office hours: **8:00am-7:00pm Eastern Time Mon-Fri**