

Working Together to Make a Difference

DONOR SECTION - REXNORD ASSOCIATE

This section is to be completed by the Rexnord associate (“Donor”). Please mail this original form and donation directly to the organization (“Recipient”). If the donation was made on-line include the confirmation/credit card receipt. Please print clearly.

ASSOCIATE NAME

RECIPIENT ORGANIZATION NAME

ASSOCIATE HOME ADDRESS

RECIPIENT CITY/STATE

ASSOCIATE CITY/STATE/ZIP

I certify that this is my own individual contribution. It is not payment for tuition or payment in exchange for, or in expectation of, significant services, fees, monetary or other benefits, subscriptions, memberships, tickets or other exclusions of the Rexnord Foundation. I will not personally benefit from this contribution.

REXNORD DIVISION / OPERATION or SUBSIDIARY and LOCATION

Enclosed is my gift* for \$ _____

* Minimum qualifying gift is \$50.00

Donation is in the form of:

- Credit Card/Online Personal Check
- Stock Transfer

SIGNATURE OF REXNORD ASSOCIATE

DATE

RECIPIENT SECTION – TO BE COMPLETED BY ORGANIZATION RECEIVING DONATION

Please complete the recipient section and enclose a copy of your IRS 501(c)(3) letter of determination. For all 509(a)(3) supporting organizations, please enclose all documentation required by the Internal Revenue Service Notice 2006-109. All requests for matching funds for donations over \$2,500 must be accompanied by a copy of the check or credit card receipt. Incomplete forms or those missing documentation will not be matched.

Please return this form to: Rexnord Foundation, Inc., 511 W. Freshwater Way, Milwaukee, WI 53204.

I certify that this organization meets the nonprofit criteria established under section 501(c)(3) of the Internal Revenue Code. The gift received from the above Donor is a voluntary contribution. It does not represent in any way tuition or payment in exchange for, or in expectation of, significant services, fees, monetary or other benefits for the Donor or any organization or person affiliated with the Donor.

RECIPIENT ORGANIZATION

RECIPIENT ADDRESS

RECIPIENT CITY/STATE/ZIP

RECIPIENT PHONE

NAME OF RECIPIENT ORGANIZATION OFFICIAL

TITLE

PLEASE CHECK APPROPRIATE CATEGORY:

- 509 (a)(1) Publicly supported charity
- 509 (a)(2) Exempt Activity Supported Charity
- 509 (a)(3) Supporting organization for 509(a)(1) or (2) charities. If 509(a)(3), please indicate which type:
 - Type I
 - Type II
 - Type III
 If **Type III**, please specify:
 - Functionally Integrated
 - Non-Functionally Integrated
- 509 (a)(4) Public Safety Charity

FEDERAL TAX IDENTIFICATION NUMBER

SIGNATURE OF RECIPIENT ORGANIZATION OFFICIAL

DATE

THE ORGANIZATION’S MISSION STATEMENT:



THE PROGRAM

The quality of life in our communities depends to a high degree on the strength of our many charitable, youth-serving, educational, cultural, medical, and civic organizations. In turn, these organizations look to the community for the financial support they need to provide vital programs and services.

In 1964, the Rexnord Foundation adopted a Matching Gift Program to complement its direct giving program which was started in 1953. The purpose of the Matching Gift Program is:

- To encourage Rexnord associates to give significant support to worthwhile community organizations of their own choosing, and
- To provide added funds to a wide group of organizations while giving Rexnord associates a strong voice in how Rexnord Foundation funds will be distributed throughout their communities.

ELIGIBLE DONORS

- Active Associates of Rexnord U.S. based divisions
- Directors of the Rexnord Foundation

ELIGIBLE ORGANIZATIONS

Organizations in six (6) categories are eligible for matching gifts. Each organization must be headquartered in the United States or Puerto Rico and must perform the majority of its work in those locations. In addition, all organizations must be tax-exempt under Section 501(c)(3) of the 1954 IRS Tax Code. Eligible organizations may receive up to \$20,000 a year in matching gifts. This ceiling excludes direct contributions from the Rexnord Foundation.

- **CHARITABLE** – providing human services and public information programs
- **YOUTH SERVING** – organizations that maintain ongoing programs for American youth
- **EDUCATIONAL** – the following institutions are eligible if they are recognized by the appropriate accreditation agency:
 - Two and four-year colleges
 - Graduate and professional schools
 - Technical Schools
 - Independent or parochial elementary and secondary schools (grades 1-12)

Tax-exempt funds, foundations, and associations that use their contributions to benefit a single education institution are also eligible.

- **CULTURAL** – professional management organizations and institutions such as:
 - Museums (including historical restorations)
 - Performing and visual arts groups
 - Botanical and zoological societies
 - Literacy societies
 - Service group supporting cultural organizations
 - “Friends” groups that support cultural organizations, if the associate is not likely to recover more than 25% of his/her contribution through reduced admissions or other member benefits.
- **MEDICAL** – privately operated hospitals that are accredited by the Joint Commission on the Accreditation of Hospitals and independently operated, non-hospital medical research foundations
- **CIVIC** – local, regional, and national organizations that are dedicated to improving the quality of life in our communities

INELIGIBLE ORGANIZATIONS/DONATIONS

Many worthwhile organizations are not eligible for legal or administrative reasons. The following types of organizations/donations are ineligible for support through the Matching Gift Program:

- **The Rexnord Foundation does not allow group matches.** A group match is when someone collects money from associates or non-associates and submits a matching gift form to the organization. The Matching Gift Program is intended for individual contributions only.
- Political organization or groups whose major purpose is to influence legislation
- Veterans organizations
- Churches, synagogues or evangelical groups
- Public elementary and secondary schools
- Professional, athletic, fraternal or social groups
- Technical and scientific societies and wildlife groups concerned with the propagation of a species
- Government agencies providing services in any of our funding categories, including government operated hospitals and government funded medical research

INELIGIBLE GIFTS

The Rexnord Foundation will not match the following associate contributions:

- To organizations/causes for which the associate will personally benefit
- For individual scholarships
- To athletic departments or programs
- For memberships, dues or subscriptions
- To adoption agencies when the associate gift is, in any way, involved in the adoption
- To educational institutions for tuition, fees or personal expenses, or contributions made in lieu of such expenses
- To organizations from which the associate is likely to recover more than 25% of his contribution through reduced admission or other member benefits
- To specific, individual Boy Scout or Girl Scout troops

GENERAL POLICY

- The minimum qualifying gift is \$50 (from a Rexnord associate) effective March 21, 2011.
- Effective March 21, 2011, the maximum amount eligible for matching is \$5,000 per associate per the *Foundation's* fiscal year, which is *November 1 through October 31*. There is no limit to the number of organizations to which you may contribute.
- Your gift must be in the form of a personal check (signed by you, a Rexnord associate), credit card (may be used for online gifts) or stock transfer. **Cash is not an acceptable form of donation.** The original signatures of both the donor and recipient on the Rexnord Foundation Matching Gift Form will serve as proof of the contribution. All donations to any one organization over \$2,500 will require a copy of your check or credit card receipt.
- Associate gifts will be matched on a 1:1 basis e.g. if you contribute \$50, the Foundation will match \$50.
- The Matching Gift Form must be completed in its entirety when returned. All incomplete forms sent to the Rexnord Foundation will be returned to the donor or recipient and will not be matched until the form is complete, including the proper legal documentation from the recipient or donor.
- Matching gift checks are issued on a quarterly basis. There are no exceptions.
- Both your gift and the recipient's organization must meet the guidelines outlined in this memorandum.

HOW TO MAKE A GIFT

- The associate completes the Donor section of the Matching Gift Form. The associate mails the Matching Gift Form and donation to the Recipient organization. If the associate makes a donation on-line, mail a copy of the confirmation and/or credit card receipt and the Matching Gift Form to the Recipient organization so they can easily locate the on-line donation.
- The Recipient organization has the responsibility to complete the Recipient section of the Matching Gift Form and return it to the Rexnord Foundation with the proper legal documentation. It is the responsibility of the associate to follow up with the organization to confirm they have returned the Matching Gift Form to the Rexnord Foundation.

The Rexnord Foundation is responsible for establishing, interpreting, and implementing the policies of the Matching Gift Program. For various reasons, the Foundation may decide to make special “one-time” exceptions to the guidelines, disqualify an individual or organization from participation in the program, or change or discontinue the program. If you have any questions about the eligibility of your gift or the organization, contact the Rexnord Foundation Administrator before making the gift.