

## Washington Mutual Matching Gift Program

### DOUBLE THE VALUE OF YOUR DONATIONS

#### Double Your Contributions

The Matching Gift Program provides a way for you to double your personal donations to qualified nonprofit organizations and schools. Within certain guidelines, Washington Mutual will match your donations dollar-for-dollar. We invite you to join the many employees who participate in this program and who are helping to make a difference in our communities.

#### Who Can Participate?

Employees of Washington Mutual and its affiliates with six months or more of continuous service at the date of the donation and who work at least 20 hours per week are eligible for the program. Washington Mutual directors are also eligible to participate.

#### Eligible Gifts

Each employee or director has a maximum matching limit of \$10,000 per calendar year, with a \$25 minimum per gift. Gifts are allocated to the calendar year in which the donation is made. For the gift to qualify for a corporate match, it must be a personal donation given directly to the non-profit, in the form of cash (please do not send cash through the mail), check, credit card, or securities having quoted market value. Gifts must be paid, not merely pledged, and given directly to the nonprofit organization.

#### Gifts That are Not Eligible

The Matching Gift Program cannot match:

- the pooled funds of more than one employee or an employee group
- a contribution for which the donor receives a direct personal benefit, including money, goods and services, gifts or advantages of membership
- unpaid pledges
- tuition or its equivalent

- in-kind contributions (e.g. clothing, automobiles)
- repayment of loans
- any other payment not made for the direct benefit of an organization.

#### Which Organizations are Eligible?

Most organizations with a 501(c)(3) tax exemption are eligible. Public or nonprofit private schools with a valid tax identification number are also eligible. However, the following organizations are excluded:

- Organizations that discriminate for any reason, including race, color, religion, creed, age, gender, sexual orientation or national origin
- Organizations or activities that influence legislation or political races
- Veterans' organizations
- Labor organizations
- Religious organizations, churches, seminaries, theological institutions and Bible colleges (A religious organization may be considered if it has 501(c)(3) status and if the donation is specifically for a community project coordinated by the organization.)
- United Way (Washington Mutual already matches employee gifts to United Way as part of our annual giving campaign in communities and states where we operate. Therefore, we do not match direct individual employee gifts to United Way through this program.)
- Private foundations

#### Administrative Conditions

Washington Mutual administers the Matching Gift Program, and matching corporate gifts are processed quarterly. With the exception of employee gifts already made, Washington Mutual reserves the right to amend, modify or cancel this program at any time.

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### INSTRUCTIONS

1. Employee completes "Matching Gift Application – Part 1" (reverse side) and sends it with donation to the selected organization.
2. The recipient organization completes "Part 2" (reverse side) and sends it to the Washington Mutual Matching Gift Program, within 120 days of the donation, at the address listed in Part 2.

**For further information contact:**

**Washington Mutual Matching Gift Program • 1-877-672-8258 • Email address: [egp@wamu.net](mailto:egp@wamu.net)**

Washington Mutual confirms eligibility and then remits the matching gift to the organization.

## Matching Gift Application – Part 1

To be completed by employee and sent with donation to selected organization.

**(Please print)**

Employee Name \_\_\_\_\_ Employee I.D. # \_\_\_\_\_ Phone Number \_\_\_\_\_

Department or Branch \_\_\_\_\_ E-mail address \_\_\_\_\_ Mailstop \_\_\_\_\_

I work at least 20 hours per week.  I have worked for Washington Mutual, one of its affiliates or recently acquired institutions for at least six months.

Name of recipient (Organization) and Program (if applicable) \_\_\_\_\_ \$ \_\_\_\_\_  
Amount of Gift

Is this gift in response to disaster relief?  No  Yes If yes, please name the specific disaster \_\_\_\_\_  
(Tsunami Relief, 911, etc.)

Is the recipient organization religious in nature?  No  Yes If yes, please name the designated benefactor \_\_\_\_\_  
(Food Bank, shelter, daycare, etc.)

(must be a separate community outreach program affiliated with a religious organization that holds 501(c)(3) status)

I hereby certify that no personal material benefit is to be derived from my donation.  Cash  Check  Security  Credit Card  
Name of Securities and # of shares: \_\_\_\_\_

Note: If the designated Matching Gift grant organization is determined to be ineligible to receive the grant, or if the grant check remains outstanding for 180 days from its issuance, or if Washington Mutual is otherwise unable for any reason to make the payment on your behalf to the organization originally designated by you, by signing below, you authorize Washington Mutual Bank to remit any grant funds otherwise intended for the charitable organization to another organization selected by Washington Mutual.

Signature \_\_\_\_\_ Date \_\_\_\_\_

## Matching Gift Application – Part 2

To be completed by recipient organization and mailed to the Washington Mutual Matching Gift Program, PO Box 7215, Princeton, NJ 08543-7215. For further information contact: 1-877-672-8258.

**(Please Print)**

Name of Organization \_\_\_\_\_ EIN (Employer Identification Number) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Phone Number \_\_\_\_\_

Web site address \_\_\_\_\_

I hereby certify that this organization/program meets the eligibility requirements of the Washington Mutual Matching Gift Program as outlined on the front of this form. I further certify that the organization has a tax-exempt status under section 501(c)(3) of the Internal Revenue Code, and that no personal material benefit has been derived by the donor from this gift.

Please include a copy of your mission statement.

What % of people served are below 80% of the median income? \_\_\_\_\_

How have you verified this amount? \_\_\_\_\_

Date Donation Received \_\_\_\_\_ Amount of Donation \_\_\_\_\_

Authorized Officer's Name / Title (Please Print) \_\_\_\_\_ Signature \_\_\_\_\_

**Forms not returned within 120 days from the date the donation was made will not be matched.**

Note: If the designated Matching Gift grant organization is determined to be ineligible to receive the grant, or if the grant check remains outstanding for 180 days from its issuance, or if Washington Mutual is otherwise unable for any reason to make the payment to the organization originally designated by the Washington Mutual employee, Washington Mutual Bank may remit any grant funds otherwise intended for the charitable organization to another organization selected by Washington Mutual.