

The H & R Block Foundation Matching Gift Program

Instructions for Donor:

- Review program guidelines and complete Part 1 of this fillable form
- Send this form directly to the educational institution

Part 1 – Donor

Name

Employee ID Daytime Phone Number

Work Street Address

City State ZIP

E-mail Address

I prefer that my gift be restricted to:

I prefer that my gift be unrestricted

I acknowledge that I am a regular, full-time employee* of H&R Block or a participating H&R Block subsidiary (to see a list of participating subsidiaries, please see program guidelines on page 2).

**An employee who works 40 or more hours per week on a non-seasonal continuing basis and is classified as a regular, full-time employee within H&R Block's Human Resources system.*

I hereby affirm that the information above is accurate and that this gift was not used for the following: (1) payments for tuition, books, loans, or student fees; (2) subscriptions for publications; (3) pooled gifts made by an eligible donor on behalf of ineligible contributors; (4) unpaid pledges; or (5) for matching funds that would provide more than the incidental benefit of recognition for the gift to me or my family. Additionally, I hereby authorize the recipient educational institution to report this gift to the Foundation's Matching Gift Program.

Signature of Associate Date

Send this form to the educational institution.

Instructions for Educational Institution:

- Complete Part 2 of the form
- Send this form to The H & R Block Foundation

Part 2 – Educational Institution

Organization Name

Organization EIN/Tax ID

Street Address

City State ZIP

School Accreditation

Amount of donor's gift Date of donor's gift

Tax deductible portion (if different from above)

I hereby confirm that (i) the recipient organization has received the gift in the form and amount described above, and (ii) the above information concerning its status as an educational institution is true and correct. In addition, the U.S. Internal Revenue Service has recognized this institution as an organization to which contributions are tax deductible. I further certify that no goods or services will be provided to The H & R Block Foundation in consideration of the matching gift.

Signature of Organization Representative

Name and Title

Date

Mail or email completed form to:

**The H & R Block Foundation
4801 Main Street, Suite 400
Kansas City, MO 64112**

**info@mhbloch.org
816.643.5700**

Form revised January 2023

For more information go to www.blockfoundation.org

The H & R Block Foundation Matching Gift Program

PROGRAM OVERVIEW

H&R Block, Inc. strongly believes in civic involvement and corporate responsibility. One of the ways this commitment is demonstrated is through The H & R Block Foundation Matching Gift Program. The Matching Gift Program gives eligible associates of H&R Block and its participating subsidiaries an opportunity to determine how Foundation funds are allocated and allows associates to make significantly larger charitable contributions to educational institutions.

WHO MAY PARTICIPATE? To be eligible, you must be considered a regular, full-time employee* of H&R Block or a participating H&R Block subsidiary. Participating subsidiaries may include but may not be limited to: H&R Block Enterprises, LLC; HRB Green Resources, LLC; HRB International Management, LLC; HRB Resources, LLC; HRB Professional Resources, LLC; HRB Technology, LLC; and Sand Canyon Corporation.

**An employee who works 40 or more hours per week on a non-seasonal continuing basis and is classified as a regular, full-time employee within H&R Block's Human Resources system.*

HOW DO I PARTICIPATE IN THE PROGRAM? Complete and sign Part 1 of the Matching Gift form and send it to the eligible educational institution. The institution must complete and sign Part 2 of the form to confirm its eligibility and receipt of your gift, and then forward it to the Foundation. The H & R Block Foundation will send a matching gift to the eligible institution and notify you after your gift has been matched. The deadline for submission of previous year's gifts is January 31.

WHAT GIFTS ARE ELIGIBLE FOR MATCHING FUNDS? Gifts must be paid, not merely pledged. Minimum gift amount is \$100. The Foundation matches gifts on a one-to-one ratio.

IS THERE A LIMIT ON THE AMOUNT OF MATCHING GIFTS? Each qualified individual is eligible to have up to \$1,000 in gifts matched each calendar year. Once your gift(s) total \$1,000, additional gifts that are made in the same year will not be eligible for a matching gift.

WHAT ORGANIZATIONS MAY RECEIVE MATCHING GIFTS? These types of organizations are eligible:

A college or university located in the United States which is accredited by one of the following regional accrediting agencies: Accrediting Commission for Community and Junior Colleges (ACCJC) Western Association of Schools and Colleges; Higher Learning Commission (HLC); Middle States Commission on Higher Education (MSCHE); New England Commission of Higher Education (NECHE); Northwest Commission on Colleges and Universities (NWCCU); Southern Association of Colleges and Schools Commission on Colleges (SACSCOC); and WASC Senior College and University Commission (WSCUC), or a school listed as an institution of higher education in the Higher Education Directory (published by Higher Education Publications, Inc.);

A nonprofit private or independent secondary school located in the United States which is accredited by one of the regional agencies listed above, or by an accrediting program approved by the National Association of Independent Schools (NAIS);

A college or university located outside of the United States which is recognized by the U.S. Internal Revenue Services as an organization to which contributions are tax-deductible and has a favorable 501(c)(3) Determination Letter from the IRS.

ARE THERE CONTRIBUTIONS THAT ARE INELIGIBLE FOR MATCHING GIFTS? Contributions ineligible for matching include: (1) payments for tuition, books, loans, or student fees; (2) subscriptions for publications; (3) pooled gifts made by an eligible donor on behalf of ineligible contributors; (4) unpaid pledges; (5) gifts for which the matching funds would provide more than the incidental benefit of recognition for the gift to the donor or the donor's family.

The Foundation reserves the right to approve or deny a matching gift request based on funding availability and/or the Foundation's determination that the request fulfills program criteria.

WHOM SHOULD I CONTACT WITH QUESTIONS? If you have any questions regarding The H & R Block Foundation's Matching Gift Program, please contact Foundation staff:

(816) 643-5700
info@mhbloch.org