

PART A – EMPLOYEE DATA

Employee should complete Part A to be sent along with his/her personal gift.

Check one:

- Primary or Secondary School
- Accredited University, College or Junior College
- Tax-Exempt Cultural Organization
- Public Radio or Television
- Non-Profit Child and/or Family Organization
- Non-Profit Social Service or Health Agency
- Other: _____

PLEASE PRINT:

Recipient Organization, Agency, or Institution

(Specific use, if any, for employee gift only)

Enclosed is my personal gift of \$ _____

I authorize the above named organization or institution to apply for a matching gift of \$ _____

Employee Name (Please Print)

Home Address/Mailing Address

City, State, and Zip

I certify that this gift was given free and clear of any obligations, and it did not represent payment for tuition, tickets, dues, memberships, services, or other exclusions listed on the reverse page.

Signature

Date

[Note: JKM employee must submit this form no later than December 31 of the calendar year in which the personal gift is made.]

PART B – RECIPIENT DATA

Recipient Organization should complete Part B and have an authorized officer of the organization verify all information, sign the certification, and mail the entire form to:

Bonnie Gauger
Johnson Keland Management, Inc.
555 Main Street, Suite 500
Racine, WI 53403-4616

PLEASE PRINT:

Organization, Agency, or Institution

Mailing Address

City, State, and Zip

CERTIFICATION BY RECIPIENT ORGANIZATION

(See instructions and deadline on reverse page)

I hereby certify that:

- This organization is described in Section 170(c) of the Internal Revenue Code.
- This organization has received an exemption under section 501(c) of the Internal Revenue Code, and it is listed in I.R.S. Publication 78. (Please include a copy of your I.R.S. Tax-Exempt letter.)
- This organization has received the gift described in Part A. in the amount of \$ _____.
- No goods or services were provided as a result of this gift (tuition, tickets, dues, or memberships).
- I understand JKM requires acknowledgement of the gift, and our organization is prepared to provide this.
- I understand JKM reserves the right to evaluate both the tax-exempt status and gift-worthiness of any organization seeking matching gifts.
- I have read the requirements for eligibility on the reverse, and these requirements have been met.

Signature of Authorized Officer

Date

Name of Authorized Officer (Please Print)

Title of Authorized Officer

Phone Number



Employee Matching Gift Program

555 Main Street · Suite 500 · Racine, WI 53403-4616

Phone 262.664.7600 · Fax 262.664.7650

Purpose

The Johnson Keland Management, Inc. (JKM) Matching Gifts Program is designed to encourage employees to contribute their own personal funds to charitable organizations in their communities, to educational institutions, and to other nationwide organizations.

Who Is Eligible?

All employees of JKM are eligible to participate the first month following the date of hire.

An employee's personal gift must be \$25 or more in order to be matched, it must be from the employee's own funds, and it must be in the form of cash. **JKM will match the employee's personal gift, dollar for dollar. JKM will pay up to \$1,000 in matching gifts per employee, per calendar year. The maximum matching gift will be \$500 to any one organization.**

Which Organizations Qualify?

An organization must be a public charity located within the United States, qualified for Federal income tax exemption under Section 501(c)(3) of the Internal Revenue Code. The organization must be listed in I.R.S. Publication 78 (or JKM must be provided with a copy of the organization's I.R.S. tax-exempt determination letter).

Tax-exempt soliciting organizations or alumni groups and foundations are eligible only if authorized by an organization eligible to receive such gifts. All gifts received must be given to the organization or used entirely for the benefit of the eligible organization.

Eligible organizations must be in one of the following categories:

- **Higher Education:** any non-seminarian college, junior college, university, or graduate school (public or private), accredited by a nationally recognized accrediting agency.

- **Cultural:** non-profit, tax-exempt, cultural organizations representing arts and humanities, including theatre, opera, symphony orchestra, ballet, modern dance, educational TV or radio, libraries, botanical gardens, zoological societies, and museums of art, history, or science.
- **Health and Welfare:** accredited and licensed public, non-profit organizations providing acute short-term care, social service, and national health agencies providing research or humanitarian services such as March of Dimes, American Cancer Society, Urban League, youth guidance organizations, child abuse and neglect groups, and eligible United Way funded agencies. Please note: JKM already provides a dollar-for-dollar company match on employee contributions to the United Way of Racine County that are pledged as part of JKM's annual campaign. Those employee contributions will not also be matched through the Matching Gift Program. (JKM will not match the same contribution twice.)
- **Schools:** any accredited public or private, primary or secondary school. **The maximum match to any one school is limited to \$500 per employee per calendar year.**

Non-Qualified Organizations

- Nursing Homes.
- Seminaries, theological schools, and schools of higher education where the primary purpose is religious studies.
- Religious, civic, fraternal, social, or political groups.

Other Restrictions

- Payments for tickets, services, tuition, bequests, insurance premiums, or membership dues to alumni groups or clubs will not be matched.
- JKM will not match any payment for which the donor receives a personal benefit, service, or gift (other than minor gifts available to all donors on a pre-published schedule).

- **The employee may designate how his/her personal gift should be used; however, JKM's matching gift will be unrestricted. JKM reserves the right to evaluate both the tax-exempt status and the gift-worthiness of any organization seeking matching gifts.**
- JKM may revise or terminate this program or a person's participation at any time without prior notice. The interpretation and application of the program rests entirely with JKM and its decisions are final.

Instructions*

Employee: Complete Part A, and send the entire form (Parts A and B) along with your personal gift to the eligible recipient organization. Be sure to include your signature on the bottom of Part A. Please print all other information, including your name where indicated.

Recipient: Complete Part B, and have an authorized officer of the organization verify all information by signing the certification. Mail the entire form (Parts A and B) to:

Bonnie Gauger
Johnson Keland Management, Inc.
555 Main Street, Suite 500
Racine, WI 53403-4616

*IMPORTANT

JKM employees must mail matching gift forms to recipient organizations no later than December 31st of the same calendar year in which personal gifts are made. JKM must receive signed copies of the matching gift forms from the recipient organizations no later than January 31st of the following year. Gifts are processed on a weekly basis.