

# Matched Funding Guidance

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Morgan Stanley EMEA recognises employees' personal fundraising and volunteering efforts through the Matched Funding Programme.

Permanent employees based in EMEA can make one application (either individual or team) per category each calendar year\*, with Morgan Stanley EMEA providing a match of up to £500.

\*Employees based in offices/locations without an official charity partner can seek prior approval for both an individual and team application.

**To make an application for Matched Funding, please [click here](#) into your browser and complete the form.**

I am a volunteer...

In recognition of your volunteer service, your organisation may qualify for a grant of up to £500...

Eligibility Criteria:

- Permanent employees based in EMEA
- If you have spent at least 25 hours volunteering for a non-profit organisation outside of the Firm's partnerships
- Volunteer hours listed on the volunteer application must be logged on Morgan Stanley's volunteer website to be considered for eligibility
- The non-profit organisation must be a registered charity or school, not already supported by the Morgan Stanley International Foundation
- The organisation must be registered and located in EMEA
- You must provide a letter from the non-profit beneficiary that confirms your volunteering involvement and the amount frequency of volunteer contributions.

NB: For team applications, this should include the names of all individuals involved

I have fundraised...

1. As an individual...In recognition of your fundraising efforts, your organisation may qualify for a grant of up to £500...

Eligibility Criteria:

- Permanent employees based in EMEA
- Completed a one-off fundraising event (virtual events included) for a non-profit organisation on their own

- Employee has been actively involved in the management and organisation of the fundraising activity - funds will not be matched for a generic fundraiser for the organisation.
- *What would count: Employee organised, managed and ran stall at a school charity fair. They sourced materials for the stall, organised volunteers, set up and closed down the stall.*
- *What would not count: Employee helped on a stall at a school charity fair as the school was recruiting volunteers. Employee did not organise or manage the stall e.g. source materials, set up, organise other volunteers.*
- Employees should only claim for their personal contribution/effort to the fundraising.
- You must be able to provide a letter from the non-profit beneficiary that confirms your fundraising contribution and the amount received. A link to a fundraising page will suffice. Please include the URL in the application fundraising description and upload a print screen in the evidence section.

2. As part of a group...In recognition of your team fundraising efforts, your organisation may qualify for a grant of up to £500 per employee...

#### Eligibility Criteria:

- Permanent employees based in EMEA that have raised money for a non-profit as a team
- The team will be eligible for a £500 match for every eligible Morgan Stanley participant, up to a maximum of £10,000
- Division or office-wide initiatives are not eligible
- You must be able to provide a letter from the non-profit beneficiary that confirms your fundraising contribution and the amount received. A link to a fundraising page will suffice. This should include the names of all individuals involved. Please include the URL in the application fundraising description and upload a print screen in the evidence section.

#### Restrictions

Funding will not be considered for the following:

- Religious programmes (though faith-based organisations providing general services to the community may be eligible for support)
- Political causes, candidates or campaigns
- Political lobbying and advocacy programmes
- Client and business development requests
- An individual's personal charitable donations
- Funds to support a specific individual or family member

The Firm reserves the right to withhold funding if the organisation does not comply with company policies or local regulations. The Firm may modify or cancel the Matched Funding Programme in its sole discretion at any time without prior notice.

*By applying for Matched Funding, you indicate your understanding and agreement with the Programme Rules. You also confirm and understand that all disclosures in the Matched Funding application must be truthful and complete in all respects, and are subject to Morgan Stanley's Code of Conduct. Failure to adhere to Morgan Stanley's Code of Conduct can lead to disqualification from the future participation in the program.*