



Company Matching Program

Charitable organizations that have special meaning to you may be eligible to receive support through the *Antares Capital Company Matching Program*. This charitable giving program is available to employees in all Antares locations. This program will match your personal donations to eligible nonprofit agencies, leveraging and increasing the impact of your contributions.

Eligible Participants

- Active regular full-time employees of Antares Capital, LP

Eligible Organizations

Nonprofit agencies recognized by the IRS as tax-exempt and designated as a public charity under Section 501(c)(3) of the IRS Code or as an instrument of a federal, state or local government as provided by Section 170(c)(1) of the Code. Organizations based outside the U.S. must carry U.S. tax equivalency in order to qualify and participate in the program.

Eligible organizations include, but are not limited to: colleges and universities, private and public elementary and secondary schools, arts organizations, health and human services agencies, civic groups, and environmental entities.

What Contributions are Eligible?

- Donations, from the donor's personal funds, which have been paid directly to an approved organization.
- The minimum gift eligible for matching is \$25. For installment gifts, each match request must be submitted separately and meet the \$25 minimum gift requirement.
- The maximum amount matched per donor per calendar year is \$10,000. If the donor makes several contributions, gifts will be matched in the order received, up to the maximum annual donor limit.
- The donor's annual limit is based on the date of the gift, not the date submitted.
- Gifts must be in the form of check or credit card – stock contributions may be matched but require prior approval from HR.
- You may be asked to provide proof of your contribution in the form of a canceled check or receipt from the charitable organization.

What Gifts are Not Eligible for Matching?

- Gifts pooled/collected from several donors that are reported as one contribution.
- Gifts made in lieu of tuition or payment for services.
- Subscriptions, memberships or any other fees for which benefits are received.
- Dues to alumni (ae) or similar groups.
- Gifts for political causes.
- Gifts or payments for religious purposes, unless specified for a community outreach program, such as a soup kitchen or homeless shelter.
- Insurance premiums.
- Bequests or life income trust arrangements.
- Gifts of real or personal property.
- Unpaid pledges.

How Does the Program Work?

Donor Instructions

- Complete Part 1 of the form and mail or e-mail along with any other necessary documentation directly to the organization.

Organization Instructions

- Complete and sign Part 2 of the form, verifying that the gift was received. The form must be signed by an authorized individual of the organization.
- Mail or e-mail the completed form to the appropriate address listed at the bottom of the Company Matching Application. Please enclose a copy of your completed W-9 form.

Eligible requests are processed on the following schedule:

Received By: 3/01 6/01 9/01 12/01

Processed By: 3/31 6/30 9/30 12/31

Company Matches must be requested within 6 months of the gift date. Requests received after that time will not be honored.

If you have any questions, please contact the Antares HR Team via email at HR@antares.com and indicate *Charitable Matching* in the subject line.

Administrative Conditions

Antares Capital reserves the right to interpret, apply, amend or revoke the program and/or the guidelines at any time without prior notice. The policies and procedures described above are not conditions of employment nor are they intended to create or constitute a contract between Antares Capital and any one or all of its employees.

Organizations approved now may not qualify for the Antares Capital Company Matching Program in the future if new information is received regarding its program eligibility. Any misrepresentation by donors will forfeit their rights to utilize the Antares Capital Company Matching Program.



Antares Capital

Company Matching Application

Part 1 – Donor Section

Instructions: Complete Part 1 of this form and mail with your donation to the charitable organization.

Part 2 – Recipient Organization Section

Instructions: Verify receipt of gift. Complete Part 2 of this form. Please enclose a copy of your completed W-9 form. Forward application and form via mail or e-mail to the appropriate address printed below.

DONOR NAME

ORGANIZATION/EMPLOYER IDENTIFICATION NUMBER (EIN)

HOME ADDRESS

ORGANIZATION NAME

CITY/STATE/ZIP

ADDRESS

OFFICE LOCATION

CITY/STATE/ZIP

BUSINESS TELEPHONE, INCLUDING AREA CODE

TELEPHONE, INCLUDING AREA CODE

FAX, INCLUDING AREA CODE

E-MAIL ADDRESS

E-MAIL

WEBSITE ADDRESS (IF ANY)

EXACT DATE OF GIFT

\$

\$

AMOUNT OF GIFT (MIN \$25)

AMOUNT TO BE MATCHED (MIN \$25)

DATE GIFT RECEIVED

\$

\$

AMOUNT OF GIFT

TAX DEDUCTIBLE GIFT AMOUNT

SPECIFIC PURPOSE OF GIFT (IF ANY)

TYPE OF GIFT: PLEASE CHECK ONE:

CHECK

CREDIT CARD

NAME OF ORGANIZATION

ORGANIZATION CITY, STATE

I hereby certify that:

- Neither my family nor I will derive any direct or indirect financial or material benefit from this contribution.
- I authorize the above-named recipient organization to report this gift to Antares Capital HR for the purpose of applying for a matching gift.
- My gift is a voluntary contribution, that it fully complies with the provisions of the program described herein, and does not represent in any way a fees for services or benefits.
- Any misrepresentation by me of the statements made herein will forfeit my rights to any matching contributions.
- I have not been, nor will be, reimbursed by anyone for this contribution.
- I have read the program guidelines and certify that this request is eligible and made in accordance with attached policies.

SIGNATURE OF EMPLOYEE

DATE

*** Forms must be received within six (6) months of the date of your donation.**

I hereby certify that:

- This organization/program meets the eligibility requirements of the Antares Capital Company Matching Program.
- That neither the donor nor Antares Capital will derive any personal material benefit from this gift or match.
- That this organization is in full compliance with the anti-terrorism laws legislated by the USA Patriot Act. In addition, by countersigning this Company Matching Application, I agree that this organization will not promote or engage in violence, terrorism, bigotry or the destruction of any state, nor will it make sub-grants to any entity that engages in these activities.
- I am authorized to attest to the above statements and have sufficient knowledge to do so.

AUTHORIZER'S NAME (PLEASE PRINT)

TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZER

DATE

Mail or E-Mail completed form and required enclosures to:

Antares Capital, LP
Attn: Human Resources Department
500 West Monroe Street
Suite 1800
Chicago, IL 60661

E-mail: HR@antares.com