

# E. & J. GALLO WINERY

## MATCHING GIFT PROGRAM FAQ

### **Q: What is The Gallo Matching Gift Program?**

A: The Matching Gift program provides employees the opportunity to direct our corporate giving by providing them an opportunity to help their favorite charities and higher education institutions while strengthening the communities where we live and work. When you give \$50 or more to a qualified organization, Gallo will give the same amount, dollar for dollar up to a maximum of \$5,000 per employee each calendar year.

### **Q: Who can participate?**

A: All U.S. based employees who have been actively employed with Gallo for 30 days or more are eligible to participate.

### **Q: Which charitable organizations are eligible for the match?**

A: Eligible organizations must (a) be located in the United States, (b) be designated as 501(c) 3 according to the IRS, and (c) not be listed as an exception to our Matching Gift Program. To find out if your organization is 501(c) 3, visit <http://www.irs.gov/app/pub-78>

### **Q: What does 501(c)(3) mean?**

A: A 501(c) 3 is the part of the Federal Tax Code that lists the criteria for tax-exempt charitable organizations. An organization must have 501(c) 3 status (be tax-exempt) in order to receive Matching Gifts program funds. While there are hundreds of thousands of eligible organizations in the United States, it is important to remember that not all 501(c)3 organizations qualify for the program based on program eligibility, see policy for more details.

### **Q: Are all gifts eligible?**

A: No, the following gifts are not eligible for a matching gift:

- Pledges, tuition, or tithes to houses of worship (e.g. churches, synagogues, etc.)
- Contributions to religiously affiliated programs or organizations whose principal purpose is propagating a particular religious faith, creed, or doctrine (e.g. missions, religious orders)
- Dues and subscription fees
- Deferred gifts (annuities, charitable remainder trusts, etc.), bequests, and insurance premiums that name the organization as a beneficiary
- Tuition fees, loan repayments, and payments in lieu of tuition
- Grouped and pooled donations (including contributions made by groups of employees or other persons and claimed as one gift from a single eligible donor)

### **Q: What do I need to do to apply for a matching gift by the Company?**

A: Obtain a copy of the Matching Gift form, complete it, and send the form along with your donation to the charitable organization.

### **Q: Where can I find the Matching Gift form?**

A: The Matching Gift form can be found on the Work Life Balance page of the Grapevine portal and on Employee Self Serve kiosks located in break rooms of the operations areas of the business.

### **Q: How and when will I know if my gift will be matched?**

A: Requests will be reviewed on a quarterly basis. At that time, employees and the charitable organizations they requested a matching contribution for will be notified.

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**Q: Do I need to submit copies of cancelled checks or receipts as proof of my contribution?**

A: No, the Matching Gift Program Administrator verifies your contribution directly through the charitable organization.

**Q: Do I have to submit separate forms every time I make a donation?**

A: No, you may submit one form for multiple donations made to the same charity over a 12 month period of time

**Q: Why do I have to provide the exact date of my donation?**

A: Gallo will not match gifts that are older than 12 months. By providing an accurate date, we can ensure the eligibility of the gift, and help the non-profit verify the match.

**Q: Will I still be able to contribute to United Way through payroll deduction?**

A: Yes, your donation to United Way will still be matched dollar for dollar by the company and will not go against your \$5,000 per year maximum.

**Q: Will my Higher Education donation still be matched?**

A: Yes, as long as it is made to a fund that is designated as 501(c)3 by the IRS and meets the program eligibility requirements. See Employee Match Policy for eligibility guidelines.

**Q: Would my donation to an athletic, band, or other school program be matched?**

A: No, the matching gift policy does not apply to gifts made to Athletic or Booster school programs, individual schools or band programs.

**Q: If I make a credit card donation by phone or by internet can I request a company match?**

A: Yes, complete the Matching Gift form and simply check the "credit card" box to indicate you have already made the donation.

**Q: When does the charity receive their matching gift from Gallo?**

A: Matching Gifts to recipient organizations are issued on a quarterly basis in March, June, September and December.

	<b>Cut-Off Date for Applications</b>	<b>Payment Date To Charities</b>
First Quarter:	Mar. 1	Mar. 31
Second Quarter:	Jun. 1	Jun. 30
Third Quarter:	Sep. 1	Sep. 30
Fourth Quarter:	Dec. 1	Dec. 30

**Q: Who I contact if I questions about the Matching Gift Program?**

A: Please email SM-Empsrv@ejgallo.com with any questions you may have.