

Education is one of this country's greatest assets. Emerson has always been interested in the welfare of the nation's educational system and has supported education with corporate contributions. Emerson also has an acute awareness of the need for support of arts and cultural organizations that enhance any community. Additionally, Emerson has prioritized funding for youth development programs in efforts to help our young people thrive. For these reasons, Emerson established a program to encourage its employees to contribute to qualifying educational institutions, arts & culture organizations, and youth development organizations of their choice, subject to the provisions of the plan as described on this page. Emerson will match, dollar for dollar, contributions made to such organizations by eligible persons.

## WHO IS ELIGIBLE?

- All full-time employees of Emerson, including wholly-owned subsidiaries and divisions.
- All active outside members of the Board of Directors of Emerson.

## HOW MUCH WILL BE MATCHED?

1. Employee limits: Emerson will match, dollar for dollar, employee tax-deductible, charitable donations of a minimum of \$25 up to an annual maximum of \$10,000, to charitable organizations qualified under the provisions of this plan. Annual limits are based upon the dates applications are received for processing at Emerson during each fiscal year (Oct. 1 - Sep. 30)
2. Organization Limits:
  - Higher education - Employee donations to institutions of higher learning, both public and private (i.e., two-year colleges, four-year colleges, universities, graduate schools, professional schools, and technical schools) are matched up to the employee annual maximum of \$10,000.
  - Private secondary schools - Employee donations to private secondary schools (high schools through 12th grade) are matched up to \$5,000 annually per school, up to the employee annual maximum of \$10,000.
  - Arts & Culture and Youth Development organizations - Employee donations to arts & culture and youth development organizations will be matched up to \$5,000 annually per organization, up to the employee annual maximum of \$10,000.

## WHAT KIND OF GIFTS WILL BE MATCHED?

Gifts must be personal tax-deductible charitable contributions made not merely pledged, paid by cash, check, electronic bill pay, credit card, and/or securities (immediately marketable) with a quoted closing market value (or bid) on the day of trading prior to the date of your gift. Tuition, dues, subscriptions to publications, or similar payments do not qualify. The giver may specify that his or her contribution is to be used for a particular purpose but the company match will be for unrestricted use by the donee.

## WHAT DOES THE ORGANIZATION DO?

If the organization qualifies for a matching gift to be paid by Emerson, their representative must complete and sign the 'Recipient Section' of the application and mail it to:

Emerson  
Matching Gifts Office, Sta. 2890  
8000 W. Florissant Ave.  
P.O. Box 4100  
St. Louis, MO 63136

Checks for the company matches are aggregated by organization and processed quarterly.

## WHICH EDUCATIONAL INSTITUTIONS QUALIFY?

Two-year colleges, four-year colleges, universities, graduate schools, professional schools, technical schools (both public and private institutions), and private secondary schools (high schools through 12th grade), provided the following conditions are met:

1. The institution must be located within the United States and its possessions.
2. It must be a nonprofit institution.
3. It must be an accredited institution.
4. You can give to a fund, a foundation, or an association that has a tax-exempt status, that collect funds for an eligible institution. The United Negro College Fund also qualifies for contributions.

## WHICH CULTURAL ORGANIZATIONS QUALIFY?

Theatre, dance, ballet, opera, symphony, concert, choral and/or chamber groups, fine arts, museums, and other cultural organizations, provided the following conditions are met:

1. The organization must be located within the United States and its possessions.
2. It must be a nonprofit organization.
3. You can give to a fund, foundation, or association that has a tax-exempt status and collects funds for an eligible organization.

## WHICH YOUTH DEV ORGANIZATIONS QUALIFY?

Boy Scouts, Girl Scouts, Boys and Girls Clubs, Big Brothers Big Sisters, Junior Achievement, Girls Inc., and other organizations with the primary mission of providing positive youth development activities, provided the following conditions are met:

1. The organization must be located within the United States and its possessions.
2. It must be a nonprofit organization.
3. You can give to a fund, foundation, or association that has a tax-exempt status and collects funds for an eligible organization.

Athletic organizations, schools and nonprofits focused primarily on health are not eligible under this category.

## HOW DO I APPLY FOR A COMPANY MATCH?

Complete this paper form and send to the charitable organization, or go online to:

<https://emerson.sharepoint.com/sites/corp/philanthropy/Lists/Matching%20Gifts%20Program%20Application/NewForm.aspx>

...or scan the QR code

