

FIRST WEBER FOUNDATION MATCHING GIFTS PROGRAM FREQUENTLY ASKED QUESTIONS

Who's eligible to use the Program?

Anyone who participates by donating a minimum amount to the Foundation—either \$10 per side of a closed sale for agents, or \$5 per paycheck for employees.

What organizations are eligible to receive matching funds?

First off, the organization must be recognized by the IRS as a 501(c)3 Charitable organization. The Foundation prioritizes organizations with a focus on Education, Arts & Culture, Health & Serving Special Needs. If you have questions, call or email the Foundation.

What organizations are NOT eligible for matching funds?

There are some legal and policy considerations that limit which organizations can receive funding— groups that are not registered 501(c)3 organizations, religious groups, fraternal, athletic or social organizations, and political organizations. If you have questions, feel free to reach out to the Foundation Director.

What contributions can be matched?

Any contribution between \$50 and \$250 made directly and personally to an eligible organization. Pledges don't count, and you can't pool contributions with your friends. (Sorry.) Tax law being what it is, we can legally match 80% of a donation to athletic programs at colleges or universities.

Will the Foundation match a contribution to my church/mosque/synagogue/ temple/political candidate/GoFundMe page?

Unfortunately, we can't fund any religious or political organizations, or any charity drives that are not a 501(c)3 charitable organization.

What about groups like the United Way, Catholic Charities, United Jewish Appeal or Madison Community Foundation?

This is another area that the Foundation Board has decided against. Any matching contributions must go to a group that provides programming or services directly, not a group that gives to other groups. (If that's confusing, feel free to reach out.)

What if I sponsor a table, buy something or get promotion from my donation?

IRS says that's a no-go. You can't receive anything of value from your donation, even if that's free promotion. We might be able to match a portion of it, but consult with the Foundation first so there's no confusion.

How much will the Foundation Match each year?

The Foundation will match your donations in a calendar year up to \$250 per charity, and up to \$1000 total per calendar year. Just be aware that we calculate your yearly total based on when we receive the matching form back from your organization, not necessarily when you made the initial donation.

OK, I feel like I know the rules. How do I make this happen?

Print the Matching Gifts Request Form (on page 2 of this .pdf), fill out the left side in ink, sign it and mail the original in with your donation to the organization you're supporting. The organization fills out the right side and mails it to us. (If you donate online, print out a receipt and mail that to the organization.)

Wait! I have a question.

Just reach out to the foundation. It's better to get the question answered early. Call Bob at (608) 443-2280 or email at foundation@firstweber.com



For FWF office use:
 Received: _____ Approved: _____ Gift Mailed: _____

MATCHING GIFTS REQUEST FORM

To avoid delays in processing please note-
 Fill in your section completely. Do not leave any field empty.
 Incomplete forms may be delayed or unprocessed.

Recipient Organization must submit Matching Gifts Request Form to the Foundation on or before November 30th for processing in the same year

Participant: First Weber Associate

- Complete Part 1 of this form.
- Submit one form for each contribution.
- Type or print in ink.
- **Sign form. Only forms with original signatures can be accepted.**
- If making a donation online, print out the donation receipt and mail with this form to the organization.
- Make a copy for your records.

Recipient Organization:

- Complete Part 2 of this form. Type or print in ink.
- **Sign form. Only forms with original signatures can be accepted.**
- **Enclose your 501(c)(3) letter, proof of accreditation or qualification as a nonprofit organization under a governmental entity. Copies of tax returns and Certificates of Exemption are not acceptable.**
- Forward the original form to the address printed below on or before November 30th. Submissions after November 30th will be held over to the next calendar year for processing.

PART 1 – PARTICIPANT SECTION (to be completed by Participant)		
PARTICIPANT INFORMATION		
Participant Name		
Office Location	Office Telephone Number (including area code) ()	
E-mail Address		
Home Address		
City	State	Zip Code
Home Telephone Number (including area code) ()		
CONTRIBUTION INFORMATION		
Name of Organization		
Address		
City	State	Zip Code
Amount of Contribution (Minimum \$50) \$	Amount of Match Requested (Maximum \$250) \$	
<i>In compliance with IRS regulations, contributions given to athletic programs at colleges and universities will be matched at 80% of the amount of the contribution.</i>		
<p>I certify that my contribution is a voluntary contribution derived from my own resources, and not a pledge or payment for tuition, services or other financial obligations. I further certify these are not collected contributions or a loan from any other person or organization; and this is a single contribution, not an aggregation of contributions. My contribution complies in all aspects with the provisions of the First Weber Foundation Matching Gifts Program Policy, and I do not expect any tangible benefit to be given to me or any person or organization named by me.</p>		
Participant Signature DocuSigned by: 13A12F2C2388428...	Date	

PART 2 – RECIPIENT SECTION (to be completed by Recipient)		
Organization Name as listed on 501(c)(3) designation letter		
Address		
City	State	Zip Code
Telephone Number (including area code) ()		
Facsimile Number (including area code) ()		
E-mail Address:		
Amount of Contribution \$	Date Contribution Received	
Amount to be Matched (Maximum of \$250) \$		
<i>In compliance with IRS regulations, contributions given to athletic programs at colleges and universities will be matched at 80% of the amount of the contribution.</i>		
<input type="checkbox"/> I have enclosed a copy of the Organization's current IRS Section 501(c)(3) designation letter		
<p>I certify the above contribution has been received and the amount of the contribution to be matched represents a charitable contribution from which the contributor derives no material benefit (e.g., tuition, tickets, subscriptions, etc.) as a result of this contribution and that it will be used to support the objectives of this organization.</p>		
Authorized Officer's Name (please print)		
Signature of Authorized Officer		
Title (please print)		
<p>PLEASE MAIL COMPLETED, ORIGINAL FORM AND 501(c)3 DETERMINATION TO: FIRST WEBER FOUNDATION, INC. 5250 EAST TERRACE DRIVE, SUITE I MADISON, WI 53718</p> <p>Bob Hemauer, Director Telephone: (608) 443-2280 Facsimile: (608) 441-3261 E-mail: foundation@firstweber.com</p>		

SUSPENSION OR TERMINATION OF THE PROGRAM

First Weber Foundation, Inc. may suspend, amend, or discontinue the program at any time and reserves the right to determine whether any contribution will be matched.

MATCHING GIFTS PROGRAM POLICY

The Matching Gifts Program has been set up to develop the synergy that comes from working together. This program takes the contribution that a Participant makes to an eligible nonprofit organization and, with some restrictions, matches the contribution dollar for dollar up to \$250 per person/per organization. Annual Match per Participant is \$1000. The match for the contribution is made using Foundation funds.

WHO IS ELIGIBLE TO USE THE PROGRAM?

Each person who has become a Participant in the FW Foundation through a voluntary payroll deduction of at least \$5 per pay period and sales agents who contribute a minimum of \$10 per side at the closing of a sale are eligible to use this program.

ELIGIBLE CONTRIBUTIONS

To be eligible for a Matching Gift donation from the FW Foundation, a contribution must be:

- A minimum contribution of \$50.00 made by a Participant (see above) directly to the eligible nonprofit organization;
- An actual contribution, not a pledge;
- A personal contribution by the Participant; it cannot come from funds provided by other individuals or groups. For example, in walk-a-thon events, forms must be submitted by each eligible Participant, not pooled by the walker/runner.

INELIGIBLE CONTRIBUTIONS

The First Weber Foundation will not make a Matching Gift donation when:

- The Participant received a benefit or gift as a result of the contribution (i.e., membership dues, subscriptions or tuition payments)
- The contribution was made to religious institutions such as churches, synagogues, temples and other houses of worship, or to any organization whose main purpose is to promote a specific faith, creed or religion and/or direct resources to advocate for a specific ideology;
- The contribution supports political parties or candidates, advocacy programs, or religious, athletic, social or fraternal organizations;
- The Participant donated personal services or contributed materials (in kind contributions), etc.;
- The contribution was made to a group whose sole purpose is to raise money to distribute to other charities in their own name.

WHAT ORGANIZATIONS & INSTITUTIONS ARE ELIGIBLE FOR A MATCHING GIFT DONATION?

The categories of nonprofit organizations that are eligible for matching gift donations from the FW Foundation are; *Higher Education, Pre-College Education, Health & Disease Specific Organizations, Arts & Culture, & Organizations Meeting Special Needs*. Contributions to nonprofit organizations not in these categories may still be eligible and the Participant should check with the Foundation staff. No specific list will be prepared, but as requests are received and approved, the names of the Organizations receiving matching gift donations will be published. Certain types of contributions are not eligible to receive matching gift donations for legal and policy reasons. It is always wise to check with the Foundation office for clarification on program limitations.

HOW DOES THE MATCHING GIFTS PROGRAM WORK?

Complete Part 1 of the First Weber Foundation Matching Gifts Request form and mail it along with your contribution to the eligible Organization on or before November 1st. An authorized representative of the Organization will then complete Part 2 of the First Weber Foundation Matching Gifts Request form and mail it to the First Weber Foundation at the address on the form along with the required documentation on or before November 30th. The matching gift donation will be made after documentation is received from the eligible Organization and processed by the Foundation office. Only forms with original signatures can be accepted. Incomplete or illegible forms may not be processed.

Participants who receive a direct personal benefit from their contribution (e.g., event admissions, advertising, meals, merchandise, membership privileges or discounts) may only request a Matching Gift donation for their contribution amount less the monetary value of any benefits received.

Contributions of \$50.00 or more will be matched dollar-for-dollar. The maximum amount of contributions that will be eligible for matching gift donations for each participant is \$1,000.00 per calendar year. This is calculated from when the Matching Gift Request form is received from the recipient organization, not when the initial donation was made. There are also limitations on the amount of matching gift donations that an eligible Organization can receive in a calendar year from a single Participant (\$250.00) and collectively from all Participants using the program (\$5,000.00). You will be notified when the matching gift request has been approved and paid. Due to IRS regulations, contributions given to athletic programs at colleges and universities will be matched at 80% of the amount of the contribution.

INTERPRETATION OF THE PROGRAM

Questions regarding the interpretation and administration of this program should be directed to the First Weber Foundation office at 5250 East Terrace Drive, Suite I, Madison, WI 53718, Telephone (608) 443-2280 or by e-mail: foundation@firstweber.com.

SUSPENSION OR TERMINATION OF THE PROGRAM

First Weber Foundation, Inc. may suspend, amend, or discontinue the program at any time and reserves the right to determine whether any contribution shall be matched.