

Lazard Foundation - U.S. Matching Gift Application

PART A: To be completed by employee

PART B: To be completed by recipient organization if an acknowledgement letter from the recipient organization has not been provided.

Part A – Employee: Please complete Part A and either submit this form to the Lazard Foundation with the acknowledgement letter from the recipient 501(c)(3) organization confirming the details of the match request or mail it with your donation or credit card receipt to the 501(c)(3) organization (see part B).

Employee Name

Home Address

City/State/Zip

Telephone (work)

E-mail (work)

Amount of Gift (indicate currency)

Amount to be Matched (min. of \$25.00)

Date of Gift (MM/DD/YYYY)

Name of Organization Receiving Gift

Program Designation (if any)

Organization's Address

Forms must be received from the organization within 12 months of the date of your gift. Requests received after 12 months will not be eligible. NOTE: Requests to match employee donations will be accepted only for eligible gifts made on or later than January 1, 2019.

Check this box if you have attached an acknowledgement letter from the recipient 501(c)(3) organization.

Certification – I certify that my gift is a voluntary charitable contribution. I verify that these are my own resources and not the gifts or loans of any other person or organization. My gift does not in any way represent tuition or an offset against tuition, and this gift is not made in return for or expectation of any monetary or material benefit for me, or for any person or organization named by me.

Employee's Signature

Date (MM/DD/YYYY)

Part B – Recipient Organization: Please complete Part B and return to the address at the top of form.

Organization Name

Tax Exempt ID Number

Address of Organization

City/State/Zip

Phone

Fax

E-mail

Web site Address

Amount of Gift (indicate currency)

Date Received (MM/DD/YYYY)

Certifying Officer's Name

Certifying Officer's Title

Certifying Officer's Signature

Date (MM/DD/YYYY)

Certification Statement: By signing and returning this form, I certify that the information in this document is accurate, that it is in compliance with all terms, conditions and restrictions of the Lazard Foundation – U.S. Matching Gift Program, that this organization is in full compliance with applicable laws and regulations, and that I am authorized to attest to the above statements.

This policy must be sent to the recipient organization with the application form if certification of gift is required.

Lazard Foundation - U.S. Matching Gift Program

Employee Eligibility - Active, full-time employees who are based in the United States are generally eligible to request a matching gift from the Lazard Foundation. New hires are eligible to participate once they have successfully completed the first three months of their employment.

Match Amount - The Lazard Foundation will match gifts dollar-for-dollar from a minimum of \$25 to a maximum of \$2,500 per eligible employee, per calendar year. The employee may make donations in the form of cash, check or credit card. Employees may request a matching gift for more than one eligible institution per calendar year so long as their individual annual cap of \$2,500 has not been reached.

Eligible Organizations - To be eligible to receive a matching gift from the Lazard Foundation, organizations must be recognized by the Internal Revenue Service (IRS) as tax-exempt and designated as a public charity under section 501(c)(3) of the Internal Revenue Code. Certain program restrictions will apply. See examples of ineligible organizations and donation types below.

Ineligible Organizations - The Lazard Foundation will not match gifts made to the following types of organizations:

- Religious organizations
- Government agencies, political organizations, lobbying groups and labor organizations
- Business or industry associations
- Charitable organizations classified as private foundations
- Any organization which is noncompliant with applicable law and regulations
- 501(c)(3) organizations that are further classified as 509(a)(3) Type III supporting organizations
- Organizations which discriminate with respect to memberships or provision of services

Ineligible Donation Types - The Lazard Foundation will not match the following types of gifts:

- Donations which result in an employee or family member receiving a benefit (e.g., auction items, dinner, raffle and/or sporting event tickets, sponsorships, golf tournaments, booster clubs, memberships, etc.)
- Grouped and pooled donations (e.g., contributions made by a group of employees or other persons and claimed as one gift from a single eligible donor)
- Contributions to a donor advised fund or charitable gift fund (including gifts to establish such a fund)
- Deferred gifts (e.g., annuities, charitable remainder trusts, etc.)
- In-kind donations of any type
- Dues, subscription fees or memberships fees
- Tuition, book or student fees

How to Contribute - Effective January 2019, eligible employees will have on-line access to Fidelity Giving Marketplace to both make donations and submit requests for matching gifts from the Lazard Foundation. Donations made outside of the Fidelity platform will be matched only upon Lazard's verification that the donations were received by eligible organizations.

To request a match for a donation not made through the Fidelity Giving Marketplace, employees must complete Part A of the matching gift application form (insert link to HR portal) and either

- submit the form to the Lazard Foundation with the acknowledgement letter from the recipient 501(c)(3) organization confirming the details of the match request; or
- mail the form with their donation or credit card receipt to a 501(c)(3) organization. An authorized officer at the 501(c)(3) must then complete Part B and send it to the Lazard address at the top of the form.

After Lazard has verified that an eligible 501(c)(3) organization has received an employee donation, the matching gift will be made to that organization in accordance with the program.

Employee donations to eligible charitable organizations must have occurred within the 12 months prior to a match request. However, the Lazard Foundation will match only those donations made on or after **January 1, 2019**.

All donations and charities will be reviewed for compliance and eligibility prior to the processing of any payment.

Program Administration - The administrators of the Lazard Foundation reserve the right to make the final determination regarding the eligibility of both donors and recipient institutions. The administrators further reserve the right to discontinue or amend any part of the Lazard Matching Gift Program without prior notice. If a matching gift is found to have been generated by an ineligible donation, the Lazard Foundation will expect the return of the matching gift from the recipient organization. Failure to abide by the program rules or the provision of any false or misleading information in connection with a matching gift request may result in disciplinary action.

For Additional Information - Email LazardFoundation@lazard.com