

Matching Gift Application

Part A: Associate Or Board Director Donor Completes This Section

Please Print

1. Fill in this section completely and sign.

2. Send this form, along with a copy of the Matching Gift Program Guidelines, and your gift to the organization.

The donor's signature authorizes the recipient organization to report this gift to Merchants Bonding Company Foundation to apply for a matching gift.

Name of Associate _____

Date of Hire _____

Home Address _____

City/State _____ Zip Code _____

Daytime Phone _____

Name of the Organization Receiving Gift _____

City/State _____ Zip Code _____

Amount of the Gift \$ _____ (minimum \$25)

Date of the Gift _____

Method of Payment _____
(cash, check or credit card)

Merchants Bonding Company
Foundation
P.O. Box 14498
Des Moines, IA 50306-3498

Phone: 515-558-8730
Fax: 515-243-3854

Attn: Kate Kreis-Claflin

Email:
KKreisClaflin@merchantsbonding.com

If you are affiliated with this organization, please indicate in what capacity (board member, fundraiser, volunteer, etc.)

I hereby certify that the above donation is entirely my personal contribution, and is not in whole or part the gift of another individual, the sum of gifts of other individuals or the gift of any group or organization. I also certify that this gift qualifies as a tax-deductible gift and is not a pledge or payment for service. I also certify that neither I, nor any member of my family, nor any related third party, will receive any direct or tangible benefit from this gift. I also certify that I have read and complied with the Program guidelines.

X _____

Signature

Date

Part B: To be Completed by Recipient Organization

1. Verify the Donor Section.

2. Complete this section completely.

3. Return this form to the address shown at the top right.

Your signature confirms recipient of the described gift.

Name of Officer Authorized to Sign _____

Title _____ Phone _____

Organization Address _____

City/State _____ Zip Code _____

Donor's Gift Amount \$ _____

Date of the Gift _____

Tax Deductible Portion of the Gift \$ _____

Federal Tax ID (EIN) _____

Amount of In-Kind Gift \$ _____

If this is the first time you have participated in Merchants Bonding Company Foundation Matching Gift Program, please include the following:

Copy of your 501(c)(3) Federal Tax Exempt letter from the IRS Mission Statement

If a school, list the accrediting agency or state department

I confirm the above gift was received and this organization is tax exempt under section 501(c)(3) of the U.S. Internal Revenue Code. I further confirm that no tangible benefit will accrue to the donor, to any member of their family, or to any related third party as a result of this gift and it will be used to support the charitable objectives of the organization.

X _____

Signature (a stamped signature is not acceptable)

Date



Matching Gift Program Guidelines

Effective February 21, 2012

Giving Philosophy

The Merchants Bonding Company Foundation Matching Gift Program represents the Company's continuing efforts to support the communities in which Merchants associates and board directors live and work. The Program is voluntary and designed to honor the diversity of associates and board directors giving by providing participants with an additional incentive to make periodic contributions benefiting eligible organizations of their own choosing.

Program Provisions

Merchants Bonding Company Foundation will match eligible associates and board directors' gifts of at least \$25 and not exceeding \$400 per associate or board director per calendar year. This may be given as a single gift or as multiple gifts cumulatively totaling \$400. All donations will be matched on a one-for-one basis and rounded to the nearest dollar. Dollar limits are based on the date of the donor's gift, not the date the matching gift is processed.

Matching Gift applications must be submitted to the eligible organization during the calendar year in which the contribution is made. Applications must be submitted within 3 months of the gift.

Contributions may be paid by cash, check or credit card and must be paid from the associate's or board director's personal funds. Non-monetary gifts such as clothing and in-kind gifts, such as services, supplies, materials or items donated, are not eligible for the match.

Who is an Eligible Associate?

- All full-time associates who have been employed for one year are eligible to apply.
- Current board of directors members

What is an Eligible Gift?

- A gift must be an actual contribution made, not a pledge to give. Gifts must be charitable contributions which are deductible for tax purposes.

What is an Eligible Organization?

- An educational institution foundation that is a 501(c)(3) located in the United States. This would normally include foundations of universities, colleges, graduate schools and technical institutes which are accredited.
- Non-profit and not-for-profit charitable organizations with a 501(c)(3) status as defined by the Internal Revenue Service and evidenced by an IRS determination letter.

How Does the Matching Gift Program Work?

1. After reviewing the guidelines, associates or board directors will need to complete Part A of the Matching Gift Application.
2. The form along with the donation and a copy of Merchants Bonding Company Foundation Matching Gift Program should be mailed by the associate or board director to the designated institution.
3. An authorized official of the institution should complete and sign Part B of the Matching Gift Application, certifying the receipt and intent of the gift in accordance with the conditions of the program. The Application should then be returned to:

Kate Kreis-Claflin
Merchants Bonding Company
P.O. Box 14498
Des Moines, IA 50306-3498
KKreisClaflin@merchantsbonding.com
515-657-5926

The interpretation, application and administration of the provisions of the matching gifts program will be determined by the President of Merchants Bonding Company and his decision will be final. Merchants Bonding Company Foundation reserves the right to modify, suspend or discontinue the Program at any time.

