

Baker & Taylor Team Member Matching Gifts Program To Educational Institutions and Charitable Organizations

The Baker & Taylor Foundation will match gifts from a minimum of \$25 to a maximum aggregate of \$6,000 per fiscal year per eligible donor. The maximum aggregate is based on combining the maximum allowable matches of \$3,000 for educational institutions and \$3,000 for charitable organizations per fiscal year per eligible donor. A matching gift will be based on payment actually completed and not on pledges or commitments for future payments. The matching gift from the Baker & Taylor Foundation is for the unrestricted use of the receiving institution or organization. However, the donor may specify that his or her contribution be used for a designated purpose or project. The donor must indicate this designation on the matching gift application form.

Eligible Donors

Regular full-time associates with at least one year of service, can make contributions at any time during the year and qualify for a matching contribution.

Eligible Institutions and Organizations

Matching contributions will **NOT** be made to any institution or organization that restricts membership by race, religion, ethnic background, age, or other limiting factors. In addition, eligible educational institutions and charitable organizations must be:

- Recognized by the United States Internal Revenue Service as tax-exempt under Section 501(c)(3) of the Internal Revenue Code
- Located in the United States

Eligible educational institutions include:

- Accredited institutions offering a 2-year or 4-year degree, such as universities, colleges, graduate schools, and technical institutions.
- Private elementary and secondary schools
- Alumni associations provided they are certified by the eligible educational institution with which they are affiliated
- Non-athletic scholarship funds provided they are administered by an eligible educational institution

Eligible charitable organizations generally fall into these four categories:

- **Cultural** including museums and arts councils
- **Health & welfare** including homeless shelters or hospitals
- **Environmental** organizations
- **Youth groups**

Ineligible Gifts

Payments described below will **NOT** be eligible to receive matching contributions:

- Contributions to organizations or funds established to support athletic programs or athletic scholarships
- Payments that cover tuition, books, student fees, subscriptions, insurance premiums, or tickets, or any payment where the contributor receives any consideration
- Membership fees
- Dues payable to alumni or other groups
- Gifts to fraternities, sororities, or other campus organizations
- Gifts intended to fulfill a person's church-related pledges or other church-related financial commitments

- Contributions made jointly by several individuals or on behalf of an ineligible participant.
- Gifts of property, goods or services
- Gifts made for bequests, dues, subscription or membership fees, insurance premiums, tuition payments or payments in lieu of tuition, books, raffles, auctions, tickets to events sponsored by or benefiting an educational institution
- Political action campaigns and election campaigns

In the event of a disagreement regarding eligibility, the Foundation Committee members will make the final determination regarding whether or not a donation will be eligible for a match.

Instructions

1. Complete and sign Section A on the second page of this Matching Gift Request Form.
2. Send the actual completed and signed form, along with your donation, to a qualifying educational institution or charitable organization.
3. The educational institution or charitable organization completes Section B and returns the form to:

Baker & Taylor
Matching Gifts Program
2810 Coliseum Centre Drive, Suite 300
Charlotte, NC 28217

After verification that the gift has been received by a qualifying organization in accordance with the B&T Foundation program guidelines, a check will be forwarded to the institution within 60 days as outlined by the examples below.

Forms Received by:	Matching Gifts sent:
February 1	March 31
August 1	September 30

An annual statement will be sent to employees at the end of each year summarizing their donation(s).

Administration

The B&T Foundation reserves the right to suspend, revise, revoke or terminate this program at any time. The interpretation, application, provision and administration of this program shall be determined by The Foundation and its decision shall be final.

Baker & Taylor Team Member Matching Gifts Program Request Form

You may make as many copies of this form as you would like. You must, however, send the actual completed and signed form along with your check to a qualifying charity.

Section A: To be completed by B&T's ASSOCIATE

Fill out Section A completely and send this form along with your donation to the educational institution or charitable organization of your choice.

Date

Name

Home Address

City State Zip

Home Phone

E-mail Address

Location

☐ Bridgewater ☐ Charlotte ☐ Commerce ☐ Mومence
☐ Reno ☐ Remote

Gift Data

Name of Foundation

Please check one ☐ Educational Institution ☐ Charitable Organization

Address

Address

City State Zip

Phone

Date of Gift
(month/day/year)

/ /

Amount of gift
(\$25 minimum
\$3000 maximum)

\$, .

Form of gift (cash gifts not eligible)

☐ Check
☐ Credit Card (include verification of charge)
☐ Online Donation (include confirmation/receipt of donation)
☐ Securities (include verification of securities: _____ number of shares of stock)

I certify that this gift is solely for the use of the organization named and that neither I, nor any member of my family, nor any directed third party will benefit in any way from this gift. I further certify that the amount given is entirely my own and meets the qualifications of the program as specified in this form.

Signature

Date

Section B: To be completed by Gift Recipient

I certify that the contribution described in Section A was received by the organization below. This is an accredited educational institution or charitable organization that has been determined tax-exempt under Section 501(c)(3) of the Internal Revenue Code, is not a private foundation, and is one to which contributions by individuals and corporations are deductible on their federal income tax returns.

PLEASE READ CAREFULLY: In order for this form to be processed, you must include a copy of the donor's check. If the gift is a security, made by credit card or online donation, a receipt documenting the gift must be included with the form.

You must enclose a copy of your federal 501(c)(3) tax-exempt determination letter, EIN number, and a copy of the donor's contribution and return them with this form to the address below.

NOTE: All Matching Gift requests and supporting documents must be received by Baker & Taylor within 90 days of the gift date.

Please type or print clearly in ink only.

EIN Number

Date

Contact Name

Title

Organization Name

Address

City State Zip

Telephone Fax

E-mail Address Web Address

Gift Amount

Tax Deductible Amount

I confirm that the above gift was received and that this organization is tax-exempt under the U.S. Internal Revenue Code. I further confirm that no direct, tangible benefit will accrue to the donor, any member of his/her family, or to any directed third party as a result of this gift and that it will be used to support the primary objectives of the organization.

Authorized Signature

Date

Please mail this Matching Gift request form and include each of the following:

- ☐ copy of federal 501(c)(3) tax-exempt determination letter
- ☐ EIN number
- ☐ verification of donor's contribution (i.e., copy of check, credit card receipt, online receipt or securities documentation)

to: Baker & Taylor---Matching Gifts Program
 2810 Coliseum Centre Drive, Suite 300
 Charlotte, NC 28217