



Donaldson Foundation

# Application for Matching Gift Program

*Enriching our Communities* is a key principle at Donaldson. Matching gifts enables employees to direct necessary funding to educational institutions of their choice. Each employee can request matching gifts to multiple institutions.

The Donaldson Foundation offers U.S. Donaldson employees an opportunity to match their personal financial contributions. Eligible educational institutions may receive an amount equal to the contribution made by a Donaldson employee, between \$50 and \$1,000.

## Application Checklist

Please complete all steps below. You may reach out to the Foundation with questions.

1. **Read the full list of eligibility and limitations listed on the last page of this document.**
2. Are you an eligible Donaldson employee?
3. Is the institution you are donating to an eligible educational institution?
4. Fill out Part 1 of the Application for Matching Gift.
5. Your donation to the Eligible Institution:
  - a. If your donation is a check or money order, include payment along with the form when mailed to the institution.
  - b. If your donation was made online, retain proof of donation (example: institution receipt or payment validation number) and include with the form when mailed to the institution.
6. Mail donation or proof of donation with completed Application for Matching Gift form to the Eligible Institution.
7. Eligible Institution will complete Part 2 of the form and return to the Donaldson Foundation.
8. Once approved, the Foundation will mail a check for the matching amount to the institution.
9. Questions can be directed to the Donaldson Foundation at [donaldsonfoundation@donaldson.com](mailto:donaldsonfoundation@donaldson.com).

## Application for Matching Gift

### Part 1 – Employee

Donaldson employee completes this section. Email or mail this form, along with your donation or proof of donation, to the Eligible Institution.

Employee Name \_\_\_\_\_

Employee Home Address \_\_\_\_\_

Donaldson Location / Mail Station \_\_\_\_\_

Name of Institution \_\_\_\_\_

Institution Address \_\_\_\_\_

Is this an eligible institution? \_\_\_\_\_

Amount of Gift \_\_\_\_\_

### Part 2 – Eligible Institution

Institution completes this section. Email or mail the form to the Donaldson Foundation at the address below.

Name of Institution \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

Contact Name \_\_\_\_\_

Date Contribution Received \_\_\_\_\_

As an authorized officer of this institution, I certify that this institution satisfies the requirements and objectives of the Donaldson Foundation Matching Gift program. I also verify that the gift is not in the form of bequests, dues, subscription fees, insurance premiums, tuition, group collections submitted by an individual, or other such payments, and that the gift is bona fide and will not be transferred to another institution.

\_\_\_\_\_  
Authorized Officer's Name (please print)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

If your institution has never participated in our Matching Gift program, please provide evidence of tax-exempt status under section 501(c)(3) of the Internal Revenue Code.

**The Donaldson Foundation**  
Matching Gift Program, M.S. 100  
P.O. Box 1299, Mpls, MN 55440  
[donaldsonfoundation@donaldson.com](mailto:donaldsonfoundation@donaldson.com)

## Matching Gift Program Eligibility and Limitations

### Employee Eligibility

Employees eligible to participate in the Matching Gift program:

- Full-time or part-time Donaldson employees – hourly or salary
- Donaldson Board of Directors

Persons not eligible to participate in the Matching Gift program:

- Contractors, interns or any non-Donaldson personnel

### Institution Eligibility

An eligible institution is an accredited public, private or charter elementary school, middle school/junior high school, high school, technical institute, junior college, community college, or degree granting college or university. All educational institutions eligible for this program must be located in the United States and have a U.S. Treasury Department ruling that contributions are deductible by the donor for federal income tax purposes.

### Gift Size

A maximum of \$1,000 will be matched by the Donaldson Foundation for any one employee during one fiscal year. There is a minimum limitation of \$50 for any one gift to a single eligible institution. The gifts must be unrestricted, and there can be no reciprocity requested between the school and donor or the donor's family.

The employee's gift cannot be a pledge. The Matching Gift cannot be matched to alumni dues, insurance premiums or other similar payments not made in the form of direct gifts and not immediately available to the institution for general educational purposes.

Should an employee wish to make a gift using securities, arrangements for matching may be made with the President of the Donaldson Foundation.

### General Limitations

Each year the Foundation will set aside a sum of money for the Matching Gift program and all eligible employee gifts will be matched up to the total of that sum. If this sum is expended and further Matching Gifts are requested, these requests will receive priority for matching if/when additional funds become available.

### Administration

Interpretation, application or administration of the Matching Gift program shall be resolved by the Directors of the Foundation. If there is some reason it is not possible for the gift to be matched, the employee will be informed as soon as the form is returned from the Institution. The Foundation reserves the right to modify or discontinue this program at any time.

All questions should be directed to the Donaldson Foundation at [donaldsonfoundation@donaldson.com](mailto:donaldsonfoundation@donaldson.com).