

BANK OF THE WEST'S EMPLOYEE MATCH PROGRAM (FREQUENTLY ASKED QUESTIONS)

1. How do I request a matching gift?

The Bank of the West Employee Match Program consists of three matching gift request methods:

1. **Recurring Payroll Deduction:** Enrollment in this method is now open year-round. Requests made from October through December are considered pledges for the following year. Requests made from January through September are considered current year gifts that will be prorated across the remaining pay periods in the calendar year. You will be prompted to select whether you would like the payroll deduction to rollover automatically each year. The minimum contribution is \$25.00.
2. **Match Request Only:** Select this method if you donated directly to your selected nonprofit and only require a corporate matching gift. Submission of receipt is not required. Your selected nonprofit will confirm receipt of your donation.
3. **Make a One-time Credit Card Gift and Match Request Simultaneously:** This option gives you the ability to donate to your nonprofit using your credit card and simultaneously request a matching gift. When prompted, enter your credit card information. Your credit card will be charged within a 24 hour period*. Credit Card donations are disbursed to nonprofits monthly. The matching funds are disbursed quarterly, 30 days after the end of the quarter in which the donation was made.

* If you are donating to an organization that has not been previously supported by the program, your credit card will not be charged until the nonprofit has been screened in accordance with USA PATRIOT Act procedures.

2. Who is eligible to participate?

All employees classified as full-time or part-time employees of Bank of the West are eligible to participate. Flex, temporary, and contractor staff are not eligible for the corporate matching gift benefit.

3. Why should I use the Employee Match Program?

Submitting your request through the Employee Match Program is the only way to receive corporate matching funds for your donations. The Employee Match Program is an easy and convenient way to double the impact of your charitable contributions. Your participation supports nonprofits working to improve the quality of life throughout the United States and deepens our collective commitment to community. The website maintains contact information on your selected nonprofits and keeps a record of your current and historical contributions. You may also use ongoing payroll deduction which is a manageable way to spread out your contribution over a year's time, rather than paying it all at once.

4. When will my organization(s) receive the company match?

Matching gift checks will typically be disbursed to charitable organizations 30 days after the end of the quarter in which the donation was made. Occasionally, there are delays verifying an organization's eligibility. When this happens, processing will occur during the next payment period. The recipient organization will be notified of your personal contribution as well as the company match. If the organization is found to be ineligible, you will be contacted by a program administrator.

Payment Schedule	
Match Request	Match Disbursement
January 1 - March 31	April 30
April 1 - June 30	July 31
July 1 - September 30	October 31
October 1 - December 31	January 31 following year

The charitable organization has real-time access via a secure website to review/confirm match details. This service assists them with the verification and payment processes associated with our giving activities and ensures prompt and clear communication about your charitable donations. Please keep in mind, that for donations made directly to a nonprofit organization, the Employee Match Program must receive a donation receipt acknowledgment from the selected nonprofit by the end of the quarter. If the nonprofit is unable to make this deadline, the matching funds will be delayed to the next disbursement period.

5. Will my payroll deduction elections be confirmed?

The system will confirm your elections and you will receive an electronic confirmation of your payroll deductions. You can also track your charitable donations and matching gifts in the My Giving History section of the Employee Match Program.

6. Can I donate directly to my charity and request matching dollars?

Yes, select the "Match Request Only" button on the Employee Match Homepage after you have made the donation to your selected nonprofit organization. Submission of donation receipt is not required. Your selected nonprofit will confirm receipt of your donation.

7. If I have questions about the program who do I call?

Please contact the program administration office via e-mail at bow@easymatch.com or call (877) 672-8238 for any questions about the program. For further assistance, contact Community Affairs at (415) 288-5606.

8. How do I find out if an organization I want to donate to is a 501(c)(3) organization?

You can call the organization directly. When you call the organization, you can also obtain general information including the Employer Identification Number (EIN), mailing address, and the name of the organization's fundraising manager. You might find it more efficient to use MelissaData.com. MelissaData maintains a search engine which contains general information on nonprofit organizations, including 501(c)(3) status, EIN, and address.

9. What is a 501(c)(3) organization?

501(c)(3) is a section of the Federal Tax Code which establishes the criteria for tax exempt charitable organizations. An organization must have 501(c)(3) status (be tax exempt) in order to receive matching funds.

10. Which organizations are eligible?

Eligible organizations must be based in the U.S. and recognized by the Internal Revenue Service as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS Code or an instrumentality of a federal, state or local government as provided by Section 170(c) of the Code.

11. Do I need a receipt for my payroll deduction donation?

No. The Internal Revenue Service accepts your pay stub as a valid receipt of your payroll deductions as long as each pay period contribution is less than \$250. If your per pay period gift is larger than \$250, the recipient organization must issue you a receipt.

12. Is there a maximum donation amount?

There is no maximum donation amount. However, the maximum match is \$1,000.00 per employee per year.

13. Is there a minimum contribution amount?

Yes. \$25.00 is the minimum contribution amount eligible for a corporate match.

14. Can I make donations to more than one organization?

Yes. There is no limit on the number of organizations you can donate to as long as it is a 501(c)(3) organization.

15. Is my donation a pre-tax donation?

No. Your donation is an after-tax deduction.

16. Ineligible Donations

Ineligible donations include gifts directed for use of a specific individual, tuition payments, or payment in lieu of tuition or other student fees are ineligible. Checks written from family foundations or trusts are also not eligible for a match. Donations to donor advised funds are currently not eligible. In addition, group gifts or pooled funds cannot be matched, only the employee's personal contribution would qualify for matching gift. Recipient organizations must not discriminate against a person or group on the basis of age, political affiliation, race, national origin, ethnicity, gender, sexual orientation or religious belief.

17. Will I receive a confirmation of my donation/match requests?

You will receive confirmation via e-mail. If in doubt, please contact the program administration office via e-mail at bow@easymatch.com or call (877) 672-8238. For further assistance, contact Community Affairs at (415) 288-5606.