

Guidelines

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Introduction

Barclays has a proud tradition of supporting and investing in the communities where we do business. The firm provides a wide-range of programs to support employees' charitable efforts, including the Barclays Educational Gift Matching Program ('Program'). Through the Program, an employee may request a matching gift from Barclays following their act of giving a personal donation to an eligible organization. Barclays will match a total of three gifts per year made by active, full-time U.S.-based employees to eligible organizations. The maximum total gift match amount per employee cannot exceed US\$2,000 per year; the minimum gift match request is US\$75.

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Who is eligible to participate?

All active full-time and part-time U.S.-based employees of Barclays Capital and Barclays Wealth are eligible to participate in the Barclays Educational Gift Matching Program ('Program'). Contingent workers (including temporary staff, consultants and contractors), interns, retirees, spouses and surviving spouses of eligible employees are not eligible for the Program.

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Which institutions qualify to receive matching funds?

Gifts must be made to a public or private educational institution, consisting of an accredited college or university (whether a junior or four-year institution), or an elementary or secondary educational institution, provided such institution is located within the United States of America, its territories or possessions. The educational institution must meet Internal Revenue Code requirements relating to tax exemption and requirements for the deductibility of gifts thereto.

In addition, the Program will match gifts to collaborative fund-raising organizations representing educational institutions. All educational institutions served by the collaborative fundraising organization must also meet the requirements stated above.

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What contributions are eligible for matching?

- The gift must be a donation from the donor's personal funds which has been paid, and not pledged, directly to an approved organization.
- The minimum gift eligible for matching is US\$75. For installment gifts, each match request must be submitted separately and meet the US\$75 minimum gift requirement.
- The donor may make up to 3 different gifts to be matched. Gifts will be matched in the order received, up to the maximum annual donor limit of US\$2,000 per calendar year.

- Matching gifts must be requested within six months of the gift date. Requests received after that time will not be honored.
- The donor's limit is based on the calendar year the gift match is paid.
- Gifts must be in the form of check, credit card, or marketable securities with a quoted market value. Gifts of securities are valued based on the average of the high and low on the date of the gift. No other form of personal or real property will be matched.

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What gifts are not eligible for matching?

- Gifts made by or through community trusts or similar organizations, including charitable remainder trusts or family foundations
- Gifts made in lieu of tuition payment for services
- Subscription, membership or any other fees for which benefits are received
- Dues to alumni(ae) or similar groups
- Subscription fees for publications
- Bequests or life income trust arrangements
- Gifts of real or personal property
- Cumulative gifts from several individuals reported as one contribution

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How the program works

To register your gift by Internet:

- Log on to www.easymatch.com/Barclays and click on "Submit a New Request."
- Register your Matching Gift request.
- You will receive an email message confirming the request.

To register your gift by mail:

The employee should:

- Complete Part 1 of the form.
- Mail the original form (faxed copies will not be accepted), with the donation and any other necessary documentation, to the institution of your choice that meets the criteria listed in the guidelines. The matching amount provided by Barclays is for unrestricted support.

The recipient organization should:

- Complete Part 2 of the original application form.
- The authorized officer of the charity must verify the donation, sign the application and return the original form to the Barclays Educational Gift Matching Program, P.O. Box 7215, Princeton, NJ 08543-7215.

Eligible requests are processed within eight weeks of submission.

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Is there a time limit for matching my gift?

Gifts must be registered within six months of the date of payment by check, credit card or traded securities. Gifts registered after that time will not be eligible. All gifts must be verified by the recipient institutions in order to be matched by Barclays.

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Contact Information

For more information, please contact the Barclays Educational Gift Matching Program at:

- Telephone: (866) 964-8171
- Email: Barclays@easymatch.com

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Administration

Barclays reserves the right to amend, suspend or terminate this Program and/or the guidelines at any time without prior notice.

Organizations approved in the past may not qualify for the Barclays Educational Gift Matching Program in subsequent years if new information is received regarding the loss of their tax status or change in their mission or their programs that indicate the organization now falls outside of the Program guidelines. However, absent such new information, previously approved organizations are likely to be approved.