

**Matching Gift Program**

Please send the original of this entire Matching Gift form along with a W-9 form to the recipient organization following completion of Parts A & B and provide a copy of the following page to Kris Rivest

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **BEAM INC. - MATCHING GIFT APPLICATION FORM** | | | | | | | | | | | | | | | |
| **PART A** | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | |
| Please print date of gift, amount, recipient organization and your name and home address below. | | | | | | | | | | | | | | | |
| **Send original of this entire application to recipient organization and provide a copy of this page to Kris Rivest** | | | | | | | | | | | | | | | |
| RECIPIENT INSTITUTION: | | | | | | | | | | | | | | | |
| FULL ADDRESS: | | | | | | | | | | | | | | | |
| DATE OF GIFT: | | | | | | | | | AMOUNT: | | | | | | |
| YOUR NAME: | | | | | | | | | | | | | | | |
| STREET: | | | | | | | | | | | | | | | |
| CITY: | | | | | | | | | STATE: | | | | | | ZIP: |
|  | | | | | | | | |  | | | | | |  |
| **PART B** | | | | | | | | | | | | | | | |
| **EMPLOYEE DATA** | | | | | | | |  | | **GIFT DATA** | | | | | |
|  | | | | | | | |  | | | | | | | |
|  | | AMOUNT: | | |  | | |
| NAME  CHECK CATEGORY: | | | | | | | | | | | | | | | |
| EMAIL ADDRESS | | | | | | | |  | |  | CULTURAL | | | | |
|  | | | | | | | |  | |  | EDUCATION | | | | |
| EMPLOYEE SIGNATURE | | | | | | | |  | |  | RELIGIOUS | | | | |
|  | | | | | | | |  | |  | SCIENTIFIC | | | | |
|  | | | | | | | | | |  | OTHER – MUST BE RECOGNIZED 501(c)(3) | | | | |
| **PART C** | | | | | | | | | | | | | | | |
| **ATTENTION: RECIPIENT ORGANIZATION** | | | | | | |  | | | | | | | | |
| Please verify the eligibility of your organization as outlined on the next page*,* ***provide the information requested below and mail original of this page including a completed W-9 form to:*** | | | | | | | | | | | | | | | |
| Beam Inc.  Matching Gifts Program 510 Lake Cook RoadDeerfield, IL 60015 **Attn.: Kris Rivest** | | | | | | | | | | | | | | | |
| As an authorized officer of this organization, I certify receipt on (date) | | | | | | | | | | | |  | | | |
| of the contribution of | | | $ | | | from |  | | | | | | | | |
| NAME OF ORGANIZATION | | | |  | | | | | | | | | | | |
| ADDRESS |  | | | | | | | | | | | | | | |
| NAME OF CERTIFYING OFFICER | | | | |  | | | | | | TITLE | | |  | |
| PHONE # |  | | | | | | | | | | DATE | | |  | |
| EMAIL |  | | | | | | | | | |  | | |  | |
| SIGNATURE | |  | | | | | | | | | TAX ID | | |  | |

# **The Program**

Through the Beam Matching Gift Program, your personal contributions to national or local nonprofit educational institutions, hospitals, cultural and youth organizations will be matched one-for-one subject to the provisions of the plan. You and Beam can become effective partners in helping to enhance the quality of life in your community and in those organizations that have special meaning to you.

# **Persons Eligible for Participation**

Regular full-time employees.

# **Institutions Eligible for Participation**

Recipient organizations must be nonprofit and recognized by the Internal Revenue Service in its Cumulative List of Organizations. If the organization is not listed, a copy of the IRS Letter of Determination must be provided. Eligible organizations are described below:

Any Tax Exempt organization recognized by the IRS as a Section 501(C)(3) organization.

For employees based outside the United States, the company will match contributions to organizations according to similar guidelines as used by the Internal Revenue Service.

Section 501(C)(3) organizations include, but are not limited to the following types of organizations:

# **Educational Institutions**

Accredited private, parochial or public primary or secondary school, or an accredited university, four-year college, two-year college or graduate school. Contributions to alumni funds or other associations will be matched only if the institution certifies that all such contributions are transmitted to the institution for its use. The employee, or his or her family, need not have attended the educational institution receiving the gift.

Scholarship funds, foundations, associations or other organizations acting in the interest of more than one school (e.g., the United Negro College Fund, the New England College Fund) are also eligible if member institutions meet requirements mentioned above, and if contributions are solely for the benefit of acceptable schools.

# **Cultural Organizations**

Includes visual and performing arts, libraries, theatres, historical societies, cultural centers (including horticultural centers), arts councils and similar groups. Nature centers with museums, monuments with museums and/or other areas of artifact display are considered eligible. Contributions to cultural events where the proceeds are intended for other organizations are not eligible.

# **Youth Organizations**

Category includes Girl Scouts, Boy Scouts, Police Athletic League, YMCA, YWCA, and similar activities. This category is designed for organizations that provide activities for students after school.

# **Institutions Not Eligible for Participation**

The following is intended as a general guide; it is not necessarily an inclusive list. If in doubt as to a gift’s eligibility, please contact ***Kris Rivest at (847) 444-7117.***

**Examples of donations which are not eligible for a matching gift are those involving:**

* Dues, payments, subscriptions and contributions which accrue significant personal benefits to the donor. (e.g., gifts, which cover the cost of services, tuition, fees, subscriptions, tickets, or other considerations).
* In-kind donations.

# **Contributions**

* Gifts will be matched from a minimum of $25 to an aggregate maximum of $1,000 per calendar year.
* Gifts must be personal contributions made directly to an approved institution.
* Pledges will not be matched until they are paid. Installment payments will be treated as separate contributions.
* The Company reserves the right to withhold a matching contribution to any organization at its discretion and may suspend, revoke or terminate this program at any time.

# **How it Operates**

* Employee should complete Parts A and B, verify by signing that the gift complies with the provisions of the program, provide one (1) copy of the application form to Kris Rivest, and mail the entire form, with the donation, to the recipient institution.
* A financial or other executive officer of the recipient institution should complete and countersign Part C, thereby certifying the contribution has been received and complies with the program provisions.
* Organization then must submit **the *completed original Matching Gift Application form* and a signed W-9 form** to Beam for processing.
* Only current year contributions will be matched. Notification of such gifts from the recipient organization must be received by Beam ***no later than March 31 of the following year****.*

**For further information, contact:**

#### **Kris Rivest**

(847) 444-7117

Kris.Rivest@beamglobal.com