



INVESTING *for* Good™

Matching Gift Guidelines:

We know education is important to our associates – and so is choice. That’s why Capital One is proud to enhance contributions you make to educational institutions. Through the associate Matching Gifts program, Capital One will match your donations to eligible educational institutions dollar-for-dollar.

- The Matching Gift program will match your direct personal contribution to any credited educational institute K-12, College or University.
- Gifts made to organizations other than credited educational institutes are not eligible to be matched through this program.
- You must be actively employed at the time of payment processing for your payment to be processed.
- Capital One will match your contribution dollar-for-dollar up to \$2,000.00 per calendar year (January 1-December 31). The minimum match is \$25.00.
- You may contribute to more than one institution; multiple contributions will be matched up to the \$2,000.00 limit.
- To be eligible for a Capital One match, your donation must be made in cash or publicly traded securities, not goods or services.
- Capital One will match associate gifts of publicly traded securities including shares of stock and mutual fund shares on a cash basis. Matching amounts for gifts of securities will be determined by averaging the high and low prices of the contributed shares on the day the contribution is made by the associate. All matches of donated securities will count towards the annual maximum match of \$2,000.00 per associate.
- All Capital One matching grants will be targeted for the same purpose as the contribution of the participating associate.
- If your donation is targeted for a special fund, it must be used to support academic program needs. You and/or your family members cannot receive special privileges or benefits, including enrollment eligibility, as a result of your donation. (Examples: sporting event tickets, tuition payments and/or raffle tickets)
- Capital One will not match donations targeted for support of athletic programs.
- Gifts contributed by family members of Capital One associates are not eligible for a match.
- All eligible, confirmed contributions will be paid in the quarterly distribution following the confirmation date.
- All matching gifts requests that remain unconfirmed by the school for six months from the request date will be cancelled.
- Your tax advisor can give you advice about the tax deductibility of your own contribution. You cannot deduct Capital One’s matching contribution from your own personal income taxes.

Please contact Kylie Kutney at kylie.kutney@capitalone.com (804) 855-6497 for additional information regarding the Matching Gifts program.