



Matching Gift Plan

FREQUENTLY ASKED QUESTIONS

Which organizations qualify for matching?

- Accredited schools (colleges, universities, junior colleges, vocational technical institutes, and elementary and secondary schools that are recognized by national accrediting agencies or associations)
- Professional arts organizations
- Historical societies and museums
- Public (educational) TV and radio

The organizations eligible for the plan must be:

- Located within the United States
- Nonprofit and nonproprietary
- Recognized by the Internal Revenue Service (IRS) as organizations to which contributions are deductible for federal income tax purposes

IMPORTANT: The Deluxe Corporation Foundation office will not honor matching gifts to organizations associated with controversial activities or those primarily concerned with religious or social service activities.

“Gifts” defined

Eligible

Gifts must be personal contributions made—not merely pledged—in cash or securities. Contributions of securities (stocks and bonds) must include quoted market value on the date of transfer.

Gifts also include distributions from a donor advised fund that was established by you and over which you maintain advisory privileges. Gifts do not include distributions from private foundations and trusts.

Ineligible

Gifts cannot be in the form of bequests, dues, preferred seating benefits, subscription fees, insurance premiums, tuition, group collections submitted by an individual (e.g., fundraisers, memorials), or other such payments. Even though such payments ultimately provide financial benefit to an organization, they are not eligible for matching.

\$500 Double Match Benefit Described

The maximum match the Foundation will make on behalf of a donor each year is \$3,000. The Foundation matches qualifying gifts of \$10 to \$2,500 and double matches the first \$500. Please note that the double match benefit is applied to the first form(s) the Foundation **receives** on behalf of a donor during the year. Once the \$500 benefit has been reached, the remaining dollars will be matched on a one-for-one basis.

The Foundation interprets, applies, and administers the Matching Gift Plan. The Foundation's decisions are **final**.

If total contributions for the year exceed the total amount appropriated for the plan, the Foundation's board of directors reserves the right to prorate gifts according to available funds. In addition, the Foundation reserves the right to revoke, suspend, or terminate the program at any time and has no obligation to match contributions made after that time.

Note: If you make monthly or quarterly donations to the same organization, please process one application form with your total annual contributions at year-end. In addition, the Foundation only honors matching gifts that are received within **four months** of a donor's entire contribution or **four months** following the final year-end payment.

The Deluxe Corporation Foundation established the Matching Gift Plan to encourage employees and other qualifying participants to support accredited schools; professional arts organizations; historical societies and museums; and public TV and radio.

The Deluxe Corporation Foundation office matches gifts twice each quarter and will acknowledge the gifts it matches on your behalf after each quarter that you participate. Because some nonprofit organizations process donations more slowly than others, it may take several months for you to receive a statement with your current contribution data.

The Foundation only matches gifts made directly to qualified organizations by eligible donors and their qualifying donor advised funds. Gifts made through a private foundation or trust do not qualify for matching.

Who's eligible to participate?

- Full-time and part-time employees
- Qualified retirees of Deluxe Corporation
- Deluxe Corporation board of directors

How to participate

1. Complete Part 1 of the application form.
2. Forward your contribution with this application form to the eligible organization.
3. The organization completes Part 2 and sends the completed application form to the Deluxe Corporation Foundation office.
4. After receiving the completed application form, the Deluxe Corporation Foundation office sends a matching gift to the organization.

APPLICATION FORM

Part 1: To be completed by eligible donor

1. Read both pages of this brochure to determine whether you are eligible to apply for a matching gift.
2. Complete ONLY THIS COLUMN of the application form.
3. Send your contribution and this form to the eligible organization. It is their responsibility to return it to the Deluxe Corporation Foundation office.
4. The Foundation only honors matching gift forms that are received within **four months** of a donor's gift.

Eligible donor's name (first, middle, last)

Employee Qualified Retiree Corporate Director

Employee number (if applicable)

Deluxe facility name and location (if applicable)

Donor's home address

City State ZIP Code

Name of organization receiving your gift

Dollar amount of your gift Date of contribution

If this was a gift made using securities, include transfer date:

If this was a gift made through a donor-advised fund:

Name of fund and managing organization

The organization is a:

- Accredited school Professional arts organization
 Public (educational) TV/radio Historical society/museum

I certify that the information submitted is correct, that my gift complies fully with the provisions of the Deluxe Corporation Foundation Matching Gift Plan as described in this brochure, and that no benefit or service is accruing to me. I further understand that misrepresentation of this gift will negate any future participation in this plan.

Eligible participant's signature (Only original signatures will be accepted)

Note: This form can be downloaded at www.DeluxeCares.com

Rev. 1/2018

Part 2: To be completed by eligible organization

1. Read both pages of this brochure to determine whether your organization meets the requirements of the Matching Gift Plan.
2. Complete ONLY THIS COLUMN of the application form.
3. Send the entire application form along with a copy of your 501(c)(3) tax exemption letter to the address below.
4. The Foundation only honors matching gift forms that are received within **four months** of a donor's gift.

Name of organization

Federal Tax Exempt No. (EIN)

Organization address

City State ZIP Code

Phone number Date of contribution received

As an authorized officer of this organization, I certify that this organization satisfies the requirements and objectives of the Deluxe Corporation Foundation's Matching Gift Plan. I also verify that the gift is not in the form of bequests, dues, preferred seating benefits, subscription fees, insurance premiums, tuition, group collections submitted by an individual (e.g., fundraisers, memorials), 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)

Signature (only original signatures will be accepted)

Title Date

- The Deluxe Corporation Foundation office must receive the completed application form within **four months** of the donor's gift.
- If the donor makes multiple gifts throughout the year, please send a summary of contributions to the Foundation's office within four months of the final year-end payment.
- It is the organization's responsibility to contact the Foundation office if a contribution has not been matched after three months of submitting the form to the Foundation office.

Please return and direct questions to:

Deluxe Corporation Foundation
3680 Victoria Street N
Shoreview, MN 55126-2906
651-787-5124