

# Deutsche Bank's U.S. Matching Gifts Program

## Introduction

The Deutsche Bank Americas Foundation U.S. Matching Gifts Program is designed to support employees' charitable interests and broaden the reach of Deutsche Bank's corporate citizenship commitment in the United States. The program supports nonprofit organizations working in community development and social services, education, arts and culture, hospitals and health care, and the environment by providing a means through which employees' personal donations may be supplemented by matching gifts from Deutsche Bank.

The procedures and guidelines contained herein are intended for eligible contributors in the United States and designed for gifts being made to eligible U.S. 501(c)(3) organizations.

For general inquiries, please call 888-783-7329 or email [dbaf@easymatch.com](mailto:dbaf@easymatch.com).

## Matching Gifts Request Procedure

- Make your donation to the nonprofit organization of your choice, or make an online donation at EasyMatch™ [www.easymatch.com/dbaf](http://www.easymatch.com/dbaf).
- Login to [www.easymatch.com/dbaf/login](http://www.easymatch.com/dbaf/login) and review the [program guidelines](#).
- Complete the online application and [submit a request](#) electronically.
- DBAF reviews your match request application and verifies the following: contributor eligibility, organization eligibility, and receipt of donation by the organization.
- If all criteria are met, your match request is approved for payment in the next available payment cycle.
- Matching gift requests will be processed on a monthly basis.

If you have any questions or require further assistance, please call 888-783-7329 or email [dbaf@easymatch.com](mailto:dbaf@easymatch.com). Please also see [Frequently Asked Questions](#).

## Eligible Contributors

All active, full-time, permanent U.S. employees and U.S. expatriates of Deutsche Bank; active Directors of Deutsche Bank.

## Eligible Organizations

Nonprofit organizations that are recognized as tax-exempt public charities under the U.S. Internal Revenue Code sections 501(c)(3) and 509(a)(1), 509(a)(2), 509(a)(3)Type I, or 509(a)(3)Type II. In rare instances, organizations classified as 509(a)(3)Type III supporting organizations are not eligible under the Pension Protection Act of 2006.

The following are the types of eligible organizations.

- Community Development / Social Service - Housing and economic development, youth and

family services, drug and alcohol abuse prevention, food distribution, health care, aged care, and disabled care organizations.

- Education - All accredited Kindergarten through 12th Grade Schools, and colleges and universities that provide the students' primary educational program. Funds, foundations and associations whose mission is to support or benefit a qualifying educational institution as described above.
- Arts and Culture - Arts and cultural organizations including public radio or broadcasting corporations, performing arts organizations, museums, historical and architectural preservation organizations, libraries, and literary societies. Performing arts, music or art schools that provide performance or exhibits for the benefit of the general public.
- Health and Hospitals - Nonprofit hospitals, hospices, clinics, nursing homes, and other health-care agencies that are accredited by the Joint Commission on the Accreditation of Hospitals or approved by Medicare. Organizations providing medical research, medical care, support or education related to specific diseases or medical conditions.
- Environment - Natural resource preservation, conservation, and animal welfare organizations; zoos; botanical gardens; and parks.

### **Eligible Contributions and Conditions**

- Contributions must be a personal gift made by an individual eligible contributor. (Gifts made through Charitable Gift Funds or Donor Advised Funds are not considered personal funds.)
- Each gift must be at least \$25.
- An aggregate of up to \$5,000 may be matched per eligible contributor per calendar year.
- Donations will be matched on a dollar-for-dollar basis.
- Donations must be paid, not merely pledged, and may be cash, check, credit card or securities traded publicly in the U.S. having a quoted market value (which will be determined by the program administrators as the mean of high-low or bid-ask price on the date of the donor's gift.).
- Matching gift applications must be received by Deutsche Bank Americas Foundation within six (6) months of the date of gift by contributor.
- Organizations must be in full compliance with the anti-terrorism laws legislated by the U.S.A. Patriot Act.

### **Ineligible Contributors**

Foreign delegates (U.S. Inpats) of Deutsche Bank working in the U.S.; retirees, spouses of eligible contributors, consultants, part-time or temporary employees; employee or directors with a non-active status.

### **Ineligible Organizations**

- Organizations that do not have a valid 501(c)(3) public charity status;
- 501(c)(3) organizations that are further classified as 509(a)(3) Type III supporting organizations;
- Organizations that discriminate on the basis of race, religion, creed, national origin, disability, handicap, age, sexual orientation, mental status, veteran status or any other basis prohibited by law;
- Private foundations or funds, private operating foundations or funds;
- Charitable Gift Funds or Donor Advised Funds;

- Fraternal, alumni, professional/ trade/ labor associations, athletic/ recreational organizations;
- Schools that do not provide a primary educational program (e.g. pre-K, professional/ trade schools);
- Institutions with the principal goal of providing religious training, organizations that promote political or religious causes; organizations that support military activities;
- Organizations that employ adversarial and/or confrontational tactics;
- Organizations that discriminate with respect to membership and/or the provision of services or use of facilities;
- Organizations that are not in full compliance with the anti-terrorism laws legislated by the USA Patriot Act.

### **Ineligible Contributions**

- Gifts made through Charitable Gift Funds or Donor Advised Funds;
- Collections, or gifts not considered a personal donation by an eligible contributor;
- In-kind donations of any type, pledges not yet paid, or gifts made under wills, bequests or insurance policies, insurance premiums;
- Employee giving campaigns (e.g. United Way campaigns);
- Gifts to religious/political organizations;
- Dues or membership fees to any organization;
- Payments for tuition, books, student fees, or services rendered;
- Gifts for the private benefit of a specified individual (e.g. scholarships);
- Gifts for which the donor receives a benefit in return such as payments for admission tickets, subscriptions, or benefit functions such as galas, dinners, etc. (In the case of donations to fundraising events where a portion of the donation is tax deductible, the tax deductible portion may be submitted for a matching gift. All program guidelines apply.);
- Any other contributions not made for the present and direct benefit of an eligible organization, or deemed ineligible by the Matching Gifts Program administrators.
- Gifts to organizations that are not in full compliance with the anti-terrorism laws legislated by the USA Patriot Act.

### **Administration**

The interpretation, application and administration of the U.S. Matching Gifts Program, which may be changed, suspended, revoked or terminated at any time, shall be determined by the officers of Deutsche Bank Americas Foundation and their decisions shall be final. Deutsche Bank Americas Foundation reserves the right to audit institutional records and documents pertaining to this program and to request supporting documentation from the contributor and/or the organization if considered necessary. If at any time a matching gift is found to have been generated by an ineligible contribution, the Matching Gifts Program will expect the return of the gift from the recipient organization. Please direct all inquiries to: Deutsche Bank Americas Foundation, U.S. Matching Gifts Program, P.O. Box 3288, Princeton, NJ 08543-3288. Or call 888-783-7329 or email [dbaf@easymatch.com](mailto:dbaf@easymatch.com).