



**\*Make sure you read page 2 before completing this form to ensure you select an eligible institution.**

## Part I. Eligible Employee

Complete Part I of this form. **Mail the form along with your contribution to the Eligible Institution.**

*Name of Employee*

*Home Address*

*Line 2*

*DCI Location/Mail Station*

*Name of Institution*

*Institution Address*

*Line 2*

*Amount of Gift*

I certify that the above information is correct and that my gift complies with The Donaldson Foundation Matching Gift Plan described in this brochure.

## Part II. Eligible Institution

Complete Part II of this form. Mail the form to The Donaldson Foundation at the above address.

*Name of Institution*

*Address*

*Line 2*

*Phone Number*

*Date Contribution Received*

As an authorized officer of this institution, I certify that this institution satisfies the requirements and objectives of The Donaldson Foundation Matching Gift Plan. I also verify that the gift is not in the form of bequests, dues, subscription fees, insurance premiums, tuition, group collections submitted by an individual, 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)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

If your institution has never participated in our Matching Gift Plan, please provide evidence of tax-exempt status under section 501(c)(3) of the Internal Revenue Code.

## Application for Matching Gift

By

**The Donaldson  
Foundation**

**Charitable Giving  
to the Community**

## The Donaldson Foundation Matching Gift Plan

The Plan provides that Donaldson will make a contribution to an eligible educational institution in an amount equal to the contribution made by an employee of the Company.

**EMPLOYEE ELIGIBILITY:** Non-employee Director or eligible employee. An eligible employee is any regular hourly or salaried employee with Donaldson Company, Inc.

There is no need to have received a degree from, or have attended, any institution as a condition for making a gift entitled to be matched by the Foundation.

Joint gifts are eligible when either of the two is a qualified giver. However, a gift by a non-qualified spouse in his or her own name, cannot be matched.

**ELIGIBLE INSTITUTIONS:** An eligible educational institution is an accredited public, private or charter elementary school, middle school/junior high school, high school, technical institute, junior college, community college, or degree granting college or university. All educational institutions eligible for this program must be located in the United States and have a U.S. Treasury Department ruling that contributions are deductible by the donor for federal income tax purposes.

**GIFT SIZE:** A maximum of \$1,000 will be matched by The Donaldson Foundation for any one employee during one fiscal year. There is a minimum limitation of \$25 for any one gift to a

single eligible institution. The gifts must be unrestricted, and there can be no reciprocity requested between the school and donor or the donor's family.

The employee's gift must be in cash and not merely a pledge. It is not the intent of this Plan to match alumni dues, insurance premiums or other similar payments not made in the form of direct gifts and not immediately available to the institution for general educational purposes. Should an employee donor wish to make a gift using securities instead of cash, arrangements for matching may be made with the President of The Donaldson Foundation.

**HOW THE PLAN OPERATES:** Simply complete the application form and send it with your personal contribution (in the form of a check, money order or credit card payment made out to the institution) to your institution. It is the responsibility of the institution to complete the form and return it to the Foundation for approval. Once the form is received from the institution and eligibility is verified, a check will be mailed to the institution from the Foundation matching the amount of the employee's contribution. If there is some reason it is not possible for the gift to be matched, the employee will be informed as soon as the form is returned from the institution.

**GENERAL LIMITATIONS:** Each year the Foundation will set aside a sum of money for the Matching Gift Plan and all eligible employee gifts will be matched up to the total

of that sum. It is expected that the sum so provided will be sufficient to match all employee contributions, but should contributions be received from employees after the sum set aside for matching has been expended, such contributions will receive priority for matching if additional funds become available. In all such cases, employee donors will be notified.

**ADMINISTRATION:** Any questions regarding interpretation, application or administration of the Plan shall be resolved by the Directors of the Foundation. The Foundation reserves the right to modify or discontinue the Plan at any time.