



## EDUCATIONAL GIFT MATCHING PROGRAM INSTRUCTIONS

- Employee complete Part A and send form to educational institution along with gift. When gifts are made by credit card, the employee should mail the matching gift form to the school. For gifts scheduled for periodic payment by credit card or automatic withdrawal, we recommend that you send a matching gift form to the school annually or semi-annually.
- Chief Financial Officer of educational institution complete Part B within 90 days of receipt of gift and send entire form to:
 

Foundation Officer  
Fifth Third Bank  
38 Fountain Square Plaza, MD 1090CA  
Cincinnati, OH 45263
- Fifth Third Foundation will mail check directly to institution.

### PART A

Name \_\_\_\_\_

Employment Date \_\_\_\_\_ Employee Number \_\_\_\_\_ Cost Center \_\_\_\_\_

E-Mail Address \_\_\_\_\_ Phone \_\_\_\_\_ Mail Drop \_\_\_\_\_

Fifth Third Department Or Affiliate \_\_\_\_\_

Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Name of Educational Institution \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

Form of Gift:  Check  Credit Card  Securities    Amount \$ \_\_\_\_\_ Date of Gift \_\_\_\_/\_\_\_\_/\_\_\_\_

If Securities, Company \_\_\_\_\_ # of Shares \_\_\_\_\_ Type of Stock \_\_\_\_\_

I certify that the information submitted is accurate and that my personal gift is in accordance with the provisions of the Educational Gift Matching Program.

\_\_\_\_\_  
SIGNATURE OF DONOR (Original – No Photocopies)

### PART B

Chief Financial Officer Of Institution \_\_\_\_\_ Name \_\_\_\_\_

\_\_\_\_\_ Title \_\_\_\_\_

Name Of Institution \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Institution's Tax ID: \_\_\_\_\_ Credit Card Gift  The Fifth Third Foundation will not include Social Security numbers on future matching gift reports. If you would like us to include your Donor or Gift ID to help identify this gift, please enter it below.

For gifts made by credit card or automatic withdrawal, please attach a report showing payment dates, amounts and the total tax deductible amount of the gifts. Report Attached

I certify that the gift described in Part A has been received by this institution, and that it is eligible for a matching gift under the provisions of your Educational Gift Matching Program.

GIFT ID: \_\_\_\_\_

Tax Deductible Amount of Gift: \_\_\_\_\_

\_\_\_\_\_  
SIGNATURE OF CHIEF FINANCIAL OFFICER

Phone \_\_\_\_\_

Email \_\_\_\_\_

## EDUCATIONAL GIFT MATCHING PROGRAM

---

### THE PROGRAM

The Educational Gift Matching Program is a way for the Fifth Third Bancorp and its employees to work together to support men and women and the institutions which will provide tomorrow's leadership to the community. The program's principal objective is to give incentive to Fifth Third employees to make regular gifts to institutions of higher learning of their choice. Under the program, Fifth Third Foundation will match, dollar for dollar, up to the stated limits, an eligible gift to an eligible school.

---

### ELIGIBLE DONORS

All regular full-time employees of Fifth Third Bancorp or one of its affiliates who have had at least six months of continuous service.

---

### ELIGIBLE INSTITUTIONS

High schools and degree-granting colleges, universities, and junior colleges qualify if they are based in the United States and are fully accredited by a recognized regional or professional accrediting agency and are tax-exempt under the Internal Revenue Service. An educational fund (e.g., The College Fund) is eligible if its sole purpose is raising and transmitting money for constituent member colleges, and if it is tax exempt. Alumni funds or foundations which exist for charitable purposes may qualify if they are an integral part of an eligible school.

---

### ELIGIBLE GIFTS

The Fifth Third Foundation will match charitable contributions from a minimum of \$25 per gift, up to a maximum total per donor of \$1,500 in a calendar year. A maximum of \$500 per employee will be given to any one institution. A personal gift must be paid (not pledged) to an eligible school, in the form of cash or marketable securities. Securities will be valued at the fair market value on the date of the gift. Gifts will be paid on a quarterly basis.

---

### NOT ELIGIBLE

- Tuition payments or gifts that reduce tuition.
  - Gifts that benefit specific individuals such as scholarships or financial aid.
  - Payments for books, student fees, alumni dues, magazine subscription fees, insurance premiums, or other payments which are not direct gifts to an eligible school.
  - Gifts made with funds provided to the donor for donation purposes by other persons.
  - Gifts made to separately incorporated fundraising entities, such as athletic funds, booster clubs, fraternities and sororities.
  - Value of personal services.
- 

### MATCHING GIFT RESTRICTIONS

The matching gift from Fifth Third Foundation may not lead to the donor receiving any benefits with a monetary value (such as tickets to athletic or social events) nor may it be used to reduce a church-related financial commitment (such as a tithe or assessment).

The employee's personal gift can be made to a specific fund of the school, but the matching dollars from the Fifth Third Foundation must be deposited into the Unrestricted Fund.

---

### ADMINISTRATIVE CONDITIONS

The Fifth Third Foundation may suspend, change or terminate this program at any time. The interpretation, application and administration of the provisions for the Educational Gift Matching Program shall be determined by the Fifth Third Foundation whose decision shall be final.