

## **FULCRUM RESEARCH GROUP, LLC -- GIFT MATCHING POLICY**

The Company recognizes that employees have causes and organizations important to them. As a benefit to employees, the company will match approved employee contributions to charitable organizations based on the following:

### ***Employee Eligibility***

The company will match contributions made by full-time employees (defined as those who work a minimum of 37.5 hours a week), who have been employed with the organization for a minimum of six months and are not on disciplinary or extended performance probation.

### ***Eligible Recipients***

All organizations are subject to approval and will be excluded if the organization's activities could harm the image of Fulcrum Research Group should they be generally known. If you have any questions about a organization speak to a managing partner.

All levels of schools, public or private, any of which qualify as an exempt organization under internal revenue code section 501(c)3, provided they don't practice racial or any other discrimination. It is the responsibility of the donor employee to contact the organization to which he or she would like to contribute and get verification of non-profit status prior to making a request for matching.

Any other tax-deductible organizations (internal revenue code, section 501(c)3), which includes:

- Cultural organizations
- Art museums
- Historical museums
- Science museums, including zoos and botanical gardens
- Libraries
- Public television/radio
- Hospitals
- Social service organizations
- Environmental/conservation groups

Political groups and any organizations involved in lobbying are not eligible.

Churches, temples, and other religious organization are not eligible unless they have a separate legal entity with 501 (c) 3 status that focuses exclusively on non-religious activities.

### ***Maximum Contributions***

The company will match (dollar for dollar or a 1:1 ratio) contributions to a maximum of \$500 per employee per calendar year. Contributions of non-cash gifts (such as frequent-flier mile gifts to charity) will not be matched.

### ***Matching Process***

Employee submits a copy of the receipt of their donation to a managing partner. The receipt must come from the charitable organization and contain the date and amount of the donation and the organizations nonprofit ID #. The company will confirm that the organization is eligible for matching, and once such a determination is made will make a matching contribution.