

## Education Matching Gifts Program

The Education Matching Gifts Program engages associates in Old National's charitable giving process and provides an incentive for associates to voluntarily support educational initiatives that are important to them.

**\*\*PLEASE READ ALL OF THE INFORMATION CAREFULLY BEFORE SUBMITTING A REQUEST.  
ALSO PROVIDE THIS OVERVIEW TO THE RECIPIENT SCHOOL.\*\***

### HOW THE PROGRAM WORKS

The ONB Foundation will match dollar-to-dollar **up to \$250** of an associate's personal contributions to educational institutions that meet program guidelines. All current full-time or part-time associates of Old National Bank and its lines of business are eligible to participate. Associates must be actively employed at the time the match is made.

Each gift must be a minimum of \$25. Donations may be made to more than one institution. A maximum of three (3) gifts per associate will be matched within a calendar year, provided the combined amount does not exceed \$250. Unused match amounts do not carry over into the next year.

### ELIGIBLE EDUCATIONAL INSTITUTIONS

Public and private elementary or secondary schools (K-12), accredited, degree-granting colleges, universities or technical/vocational schools located in the United States that are eligible to receive tax deductible donations under section 501 (c)(3) of the IRS Code or are an instrumentality of a federal, state or local government as provided by Section 170(c)(1) of the IRS Code. A tax-exempt foundation or fund may also be eligible, if it is an integral part of an eligible educational institution that will transmit funds it receives directly to the institution or will use all funds for the benefit of the institution.

### APPLICATION PROCESS

- The **Associate completes Part A** of the application form; then sends the form, including overview/eligibility, and donation to the recipient educational institution.
- The **Educational Institution completes Part B**, verifying that the organization and the donation meets the outlined criteria and returns the form to the Old National Bank Foundation.
- Foundation staff then determines the eligibility of the associate, the recipient and the contribution.
- After verification, the matching gift portion will be sent directly to the educational institution and an acknowledgement is sent to the associate.
- If the institution or contribution is deemed ineligible, an acknowledgement citing the reasons will be sent to the associate and institution.
- If you have questions regarding eligibility, contact the Old National Bank Foundation by email at [grants&sponsorships@oldnational.com](mailto:grants&sponsorships@oldnational.com) prior to making your contribution.

### PROGRAM ELIGIBILITY

- Tax deductible contributions paid directly by the associate to the eligible organization may be matched. Any non-deductible portion of a gift will not be matched.
- Gifts must be made via cash, check or credit card. In-kind gifts, including volunteer service, are not eligible.
- Gifts must be paid, not merely pledged and must be the associate's own money and not collected from others.
- Request forms must be submitted within 6 months from the date that the donation was made and the donation must have been made during the current calendar year.
- A combined gift made by married associates will only be matched up to the maximum match amount allotted to each associate. For example, a combined gift of \$250 will not be matched at \$250 per married associate. It would be matched at \$125 per married associate.
- A matching gift cannot be used to satisfy a personal pledge or a pre-existing commitment between the associate and the institution. For example a pledge of \$500 cannot be satisfied with \$250 from the donor and \$250 from the ONB Foundation match.

## PROGRAM RESTRICTIONS (Donations that will not be matched)

- Dues to alumni or athletic groups, school clubs, scout troops, PTAs/PTOs, fraternal groups, etc.
- Amounts paid for tuition, books, travel, fees, memberships, dues, tickets, meals, subscriptions, entertainment or other tangible benefits.
- Donations associated with a church-related financial commitment or tithe.
- Gifts made to pay admission to benefits, conferences or fundraisers.
- Gifts or scholarships benefiting an individual.
- Contributions to pre-schools, nursery schools, or virtual schools.
- Contributions to a United Way campaign and/or gifts made via payroll deduction.
- Contributions supporting activities for religious or political purposes.
- Gifts to institutions whose principal purpose is the education of candidates for the priesthood, ministry, rabbinate, or religious orders.
- Gifts made in for tuition or student fees, books or loan payments and other related items.
- Charitable contributions made as bequests or through entities such as charitable remainder, lead/personal trusts or charitable gift annuities.
- Gifts made from donor advised funds, private or family foundations, real estate, personal property, annuities or bequests of life income trust arrangements.
- Group gifts or gifts made on behalf of others – each associate must register his/her own contribution for matching. Associates may not register contributions made by or on behalf other individuals, including clients. This also includes pooled gifts or third party gifts.
- Gifts for contests, competitions, telethons, marathons, races, etc.
- Gifts made by spouses who are not ONB associates.
- Gifts made to organizations that discriminate on the basis of a person's race, color, religion, national origin, sex, sexual orientation, age, disability, veteran status or other characteristics protected by law.
- Gifts to organizations that do not comply with the USA Patriot Act.

## ADMINISTRATION

- Matching gift forms are available on the HR Forms and Communications pages on the Intranet or by contacting the ONB Foundation Staff by email at [grants&sponsorships@oldnational.com](mailto:grants&sponsorships@oldnational.com).
- The ONB Foundation manages all aspects of the program, including recipient eligibility, and reserves the right to modify, suspend or terminate the program at any time for any reason and all decisions made are final.
- The ONB Foundation reserves the right to deny a matching gifts request for any reason, including those in which a conflict of interest appears to exist between the donor and the recipient.
- The financing of this program is exclusively the responsibility of the ONB Foundation and should not be considered a benefit of the company.
- Matching Gifts will be processed on a quarterly basis and operates on a first-come, first-served basis.

# Education Matching Gifts Request Form

**PART A – TO BE COMPLETED BY THE OLD NATIONAL ASSOCIATE MAKING THE DONATION** (Print clearly)

_____ Associate First and Last Name		_____ Associate ID#
_____ Old National Department/Business Line and Location Including City/State		( ) _____ Work Phone Number
_____ Date of Contribution (mm/dd/yyyy)	_____ Amount of Paid Contribution	_____ Amount to be Matched

\_\_\_\_\_  
Name of Educational Institution or Tax-Exempt Fund/Foundation/Association to which the donation is being made

Please check which best describes the recipient organization:

College/University    Technical/Vocational    Public K-12    Private K-12    Tax-Exempt Fund/Foundation

Are you or a family member affiliated with this organization, i.e. serving as an officer, director, trustee or paid advisor?

Yes    No   If yes, indicate affiliation: \_\_\_\_\_

I certify that the information submitted is accurate and that my request complies fully with the provisions of the ONB Foundation Matching Gifts Program. The matching gift request does not fulfill any pledge amount I have made to the institution. The donation is my personal contribution, and is not, in whole or in part, the donation of another individual(s). No goods or services were given in return for this gift. I authorize the recipient institution/organization to report this gift to the ONB Foundation.

_____ Associate Signature	_____ Date
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**PART B – TO BE COMPLETED BY THE RECIPIENT ORGANIZATION/INSTITUTION** (Print clearly)

Prior to submission please read all of the information contained in the program overview to ensure both the organization and the contribution are eligible and meet all program guidelines. Additional required documents are listed below.

- A copy of the IRS 501 (C)(3) tax-exempt letter is required (unless previously submitted)
- Most recent directory listing is required for parochial schools
- List the accrediting agency \_\_\_\_\_

\$ _____	\$ _____	\$ _____	_____	_____
Total Pledged	Amount Paid	Tax Deductible Amt	Date Received	Purpose/Use of Gift <b>(REQUIRED)</b>

_____ Name of Recipient Educational Institution			_____ Tax ID/EIN#
_____ Street Address			( ) _____ Phone Number
_____	_____	_____	_____
City/State	Zip	Email: _____	
_____ Printed Name and Title of Authorized Representative			

I certify that the institution and donor's gift meet the eligibility requirements outlined by the ONB Foundation in the Program Overview and that the information included on this form is true to the best of my knowledge. No goods/services were given in return for this gift.

_____ Associate Signature	_____ Date
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