

PACCAR Foundation
Educational Matching Gifts Program
Application Form
(see accompanying Guidelines)

PLEASE NOTE, TO BE CONSIDERED, SECTIONS 1 AND 2 OF THIS APPLICATION FORM MUST BE COMPLETED IN FULL.

SECTION 1 – APPLICATION – To be completed by the “employee,” as defined in Section B of the Program Guidelines, and forwarded along with the employee’s donation to the eligible institution.

EMPLOYEE’S NAME _____ E-MAIL ADDRESS _____

HOME ADDRESS _____ CITY/STATE/ZIP _____

EMPLOYMENT STATUS: REGULAR/RETIRED FULL-TIME SALARIED _____ CURRENT/RETIRED DIRECTOR _____

Enclosed is my personal gift of \$ _____ or _____ share(s) of securities having a quoted market value on the date below of \$ _____. I designate that my gift be used for _____

(not required). I authorize the below-named educational institution to request a matching gift from the PACCAR Foundation.

EDUCATIONAL INSTITUTION _____

ADDRESS _____ CITY/STATE/ZIP _____

EMPLOYEE’S SIGNATURE _____ DATE _____

SECTION 2 – VERIFICATION – To be completed by an authorized officer of the above-named institution and mailed to:

Administrator
PACCAR Foundation
P.O. Box 1518
Bellevue, WA 98009

I certify that the above-named educational institution qualifies as an eligible institution, as set out in Section C of the Program Guidelines; that the contribution described herein was received by this institution from the above-named employee; that the matching gift requested will be used solely for educational purposes and is not in lieu of a specific individual’s tuition; and that this institution qualifies for tax deductible contributions.

AUTHORIZED OFFICER - NAME _____ TITLE _____

SIGNATURE _____ DATE _____

INSTITUTION’S ACCREDITING ASSOCIATION(S) _____

RECIPIENT, PLEASE NOTE: Employees may restrict their gifts to specific programs; however, Foundation Matching Gifts are unrestricted.

SECTION 3 – ELIGIBILITY VERIFICATION – To be completed by PACCAR Human Resources/Foundation Administrator:

PACCAR HUMAN RESOURCES – ELIGIBILITY OF APPLICANT (see Section B of the Program Guidelines):

- APPROVED (initial and forward to the Foundation Administrator) _____

- DECLINED – REASON (specify reason, initial and forward to the Foundation Administrator) _____

ADMINISTRATOR – DISPOSITION (see Sections C, D and E(3) of the Program Guidelines):

- APPROVED _____ AMOUNT \$ _____ ENTERED _____ CHECK # _____

NOTICE SENT TO EMPLOYEE _____

- DECLINED (specify reason, initial and date) _____

_____ NOTICE SENT TO APPLICANT & EDUCATIONAL INSTITUTION

PACCAR Foundation
Educational Matching Gifts Program Guidelines
(See accompanying Application Form.)

A. PURPOSE

The purpose of educational matching gifts is to provide contributions to eligible educational institutions supported by salaried employees of PACCAR Inc divisions and subsidiaries and by directors of PACCAR Inc, in accordance with these guidelines.

B. EMPLOYEE ELIGIBILITY

To be eligible, an “employee” must be a regular full-time or retired salaried employee of PACCAR Inc or subsidiary company or a current or retired director of PACCAR Inc. The employee must have completed at least one year of service by the date of the contribution. It is not necessary for the employee to have attended the educational institution to which the contribution is made.

C. ELIGIBLE INSTITUTIONS

To be eligible to receive a matching gift, an educational institution must be located in the United States, qualify for tax-exempt status as specified under section 501(c)(3) of the Internal Revenue code and be one of the following:

1. A private, nontax-supported secondary school offering diplomas valid for entry into an accredited institution of higher learning.
2. A junior college, four-year university or college, or graduate or professional school that is accredited by the appropriate regional or professional accrediting association.
3. An alumni fund or other fund integrally related to the educational function of the institution and recognized by the Internal Revenue Service as qualifying for tax-exempt charitable donations.
4. An association which raises funds for distribution to institutions otherwise eligible under 1, 2 or 3 above (e.g., Independent Colleges of Washington Inc., United Negro College Fund, etc.).

D. ELIGIBLE GIFTS

Educational matching gifts are subject to the following guidelines:

1. The employee’s gift must be cash or securities having a quoted market value.
2. An employee’s contribution must actually be made, not merely pledged, to be matched.
3. The minimum for an employee’s individual gift is \$100 per educational institution. The cumulative maximum gift is \$5,000 per employee per calendar year. PACCAR Foundation will provide a 100% match of eligible gifts.
4. A contribution by the employee may be designated for a specific use, but the company’s matching grant will be unrestricted.
5. Employee contributions to be matched may go to more than one institution if the minimum amount to each institution is met and the maximum per employee is not exceeded.
6. Tuition, student fees, alumni dues, alumni publication subscriptions and insurance premiums in favor of an institution, or any similar payment which provides the employee a personal benefit, are not eligible for matching gifts.

E. APPLICATION PROCEDURES

Use the application form on the reverse side to request educational matching gifts:

1. Section 1 is to be completed by the employee and the form sent with the employee’s contribution to the educational institution. Section 1 is the employee’s application for a matching gift.
2. Section 2 is to be completed by the educational institution and the form then returned to the PACCAR Foundation. Section 2 is the educational institution’s verification of receipt of the employee’s gift and certification that the institution meets the Eligible Institutions guidelines set out in Section C above.
3. Section 3 is to be completed by PACCAR Human Resources and the Foundation Administrator:
 - a. **IF APPROVED**, an award letter and check will be sent to the educational institution and notification will be sent to the employee via e-mail or regular mail if an e-mail address is not available.
 - b. **IF DECLINED**, a copy of the declined application, along with a letter stating the reason, will be mailed to the employee and a copy will be sent to the educational institution.