



MATCHING CHARITABLE GIFT POLICY

Am I eligible?

You must be a permanent full-time employee with Perry Capital for at least one year and be eligible for full benefits prior to making your contribution.

Is there a limit on what I can give?

Perry Capital will match gifts from a minimum of \$25 to a maximum of \$2000 per employee, per calendar year. The gifts may be made in the form of cash or securities. Contributions can be made to more than one eligible institution.

How does a charity qualify for the program?

To be eligible, all institutions must be recognized by the United States Treasury Department as tax exempt under Section 501 (c) (3) of the Internal Revenue Code (the "Code").

Contributions can be made to institutions in the United States provided the institutions are recognized by the United States Treasury Department as non-profit, non-proprietary institutions, contributions to which are deductible by the donor for federal income tax purposes.

What types of gifts are not matched?

Perry Capital will not match political contributions or non-deductible contributions and are subject to approval by the Perry Capital Charity Committee.

In addition, charitable contributions in which an employee receives some benefit (i.e. tickets to a benefit, etc.) will only be matched by Perry up to the amount of the tax-deductible portion of that contribution.

When are matching gifts disbursed?

Upon formal approval by the Perry Capital Charity Committee.

How do I fill out the form?

If you are an eligible employee, you must complete Part A of the attached application. The charitable institution completes Part B.

After completing Part A, submit pages 1 and 2 of this application directly to the institution, not to Perry Capital, along with your contribution. After filling out Part B, the institution returns the application directly to Perry Capital.

Incomplete applications will delay processing.

Administration

Perry Capital reserves the right to make the final determination regarding the eligibility of both donors and recipient institutions. Perry further reserves the right to discontinue or amend any part of the Program without prior notice.

If you have any questions, or need additional information, please contact Human Resources.