

# Educational Matching Gift Program Guidelines

## The program

At Wells Fargo, we recognize that our company, stockholders, team members, and communities all benefit when educational institutions are supported. The Educational Matching Gift Program matches donations — dollar for dollar, from \$25 up to \$5,000 per team member, per calendar year — made to accredited public universities and colleges, school districts, and schools; accredited private universities, colleges, and schools that are IRS-designated 501(c)(3) charitable organizations; accredited charter schools that are operated by a school district or are IRS-designated 501(c)(3) charitable organizations; and foundations that support a school district or any of the above-mentioned public, private, or charter schools.

## Eligible participants

All active regular, part-time, or flexible team members of Wells Fargo or any of its subsidiaries are eligible and encouraged to participate. Active executive board members are also eligible. Wells Fargo retirees are ineligible to participate.

## Eligible organizations

- **Accredited educational institutions** including:
  - Public and private
  - Prekindergarten
  - Elementary schools
  - Secondary schools
  - Junior colleges
  - Colleges
  - Graduate schools
  - Technical or vocational schools
  - School districts
  - Charter schools operated by a school district or are IRS-designated 501(c)(3) charitable organizations
  - Educational foundations that financially support schools located within the United States
- **Parent Teacher Agencies (PTAs)/Parent Teacher Organizations (PTOs)** sanctioned by a specific school that raise funds for the specific school's general fund and have a tax identification number and 501(c)(3) charity status that is separate from the school that they support.
- **Booster Clubs** that raise funds for a specific school's sanctioned athletic program or sanctioned enrichment program and have a tax identification number and 501(c)(3) charity status that is separate from the school that they support.
- **Scholarship Programs** that are sponsored by a specific school for tuition at that school.

**NOTE:** If team members direct their contribution to certain programs, associations, clubs or agencies noted above — but it does **not** have its own tax identification number and 501(C)(3) charity status — the match will go to the school's general fund as unrestricted support.

## Ineligible organizations

- Alumni associations
- Agencies that provide scholarships
- Programs provided to students by agencies other than the school
- Agencies that do not offer a standard curriculum
- Educational funds or foundations that do not support a specific school or school district's general fund
- Special funds set up by a school for a purpose other than educating students
- Schools located outside of the United States

## Eligible donations

- The donation must be from the team member's personal funds, which have been paid directly to an approved school, or made through the annual Community Support and United Way Campaign.
- The minimum eligible gift for matching is \$25. For installment gifts, each match request must be submitted separately and meet the \$25 minimum gift requirement.
- Gifts must be in the form of check, credit card, stocks, or marketable securities with a quoted market value.
- Gifts of stocks or securities are valued based on the average of the high and low on the date of gift. No other form of personal or real property will be matched.

## Ineligible donations

- Gifts made in lieu of tuition payments, fees, repayment of loans, or charges fixed by a school as a condition of enrollment
- Fees associated with club and alumni membership or other fees incurred while in attendance at a school
- Subscription, membership, or any other fees for which benefits are received
- Gifts of real or personal property
- Cumulative gifts from several individuals reported as one contribution
- Gifts to organizations that support schools where the organization is neither a school nor a foundation supporting a school
- Payments for which goods or services were received, such as purchases at a school fundraiser auction or tickets to an event
- Donations matched by the employer of a family member or any other entity.

## Processing donations

Matching gift disbursements are processed monthly.

Contributions must be given, not just pledged. Eligible participants may request that a gift be matched up to one calendar year after the gift has been made. Wells Fargo reserves the right to approve or decline match requests.

Please direct matching gift questions to 1-866-222-3417 or email [help@wellsfargo.dotopia.com](mailto:help@wellsfargo.dotopia.com).