



HUMAN RESOURCES  
545 WASHINGTON BOULEVARD, 22<sup>ND</sup> FLOOR JERSEY CITY, NJ 07307

## MATCHING GIFTS REQUEST FORM

### Part A – Donor Section

Please complete Part A and forward this entire form to the Recipient Organization. Recipient Organization will complete Part B.

<p><u>Donor Information</u></p> <p><b>Active Employees</b> Employee ID: _____</p> <p><i>*If donor is the spouse/domestic partner of an active employee please enter employee ID above.</i></p> <p><b>Retirees and Directors</b> Social Security Number: _____</p> <p><i>*If donor is the spouse/domestic partner of a retiree or Director please enter the social security number of the retiree or Director above.</i></p>
<p><u>Donor Status</u></p> <p><input type="checkbox"/> Employee</p> <p><input type="checkbox"/> Employee Spouse/Domestic Partner</p> <p><input type="checkbox"/> Retiree</p> <p><input type="checkbox"/> Retiree Spouse/Domestic Partner</p> <p><input type="checkbox"/> ISO Director</p> <p><input type="checkbox"/> ISO Director Spouse/Domestic Partner</p>
Donor Name
Home Address
City/State/Zip
Phone
E-mail Address
Date of Gift
Amount of Gift
Type of Gift (select one) <input type="checkbox"/> Cash/Check <input type="checkbox"/> Credit Card <input type="checkbox"/> Securities
<b>If Securities</b>
Name of Security
Number of Shares
Date of Transfer
Recipient Organization Name
City/State
Program Designation (if any)

### Part B – Recipient Organization

Please complete the following information and forward form to:

**ISO Matching Gifts Program**  
545 Washington Boulevard  
Jersey City, NJ 07310-1686  
FAX: 201-469-4141

**Forms that are faxed do not have to be mailed in.**

<b>EIN:</b>
Organization Name
Mailing Address
City/State/Zip
Phone
Fax
E-mail Address
Website Address
<b>Gift Amount</b>
Tax Deductible Gift Amount

**Certification Statement:** I hereby certify the receipt of the gift described herein, the eligibility of this organization, and that the use of these funds will support the primary aims of this organization. I attest that they will not be used to pay any fees or in lieu of tuition.

Name of Organization Representative
Title
Signature
Date

For questions about the ISO Matching Gifts Program please contact Janet Borino, Human Resources -- Employee Benefits, at 201-469-3032 or e-mail [JBorino@ISO.com](mailto:JBorino@ISO.com).

**Certification Statement:** I hereby certify that the information I have provided is complete and correct and that my gift hereby complies with the program provisions stated on this form.

Donor Signature
Date

*\* ISO reserves the right to modify or discontinue this program at any time. The interpretation, application and administration of the provisions of this program shall be determined solely by ISO, and its decisions shall be final.*

## ISO Matching Gifts Program Guidelines

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### Purpose

The purpose of the ISO Matching Gifts Program is to encourage support of certain non-profit educational or charitable organizations by magnifying personal gifts by employees, directors and retirees.

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### Who is eligible to participate?

Full-time and part-time active ISO employees, directors and retirees, and their spouses and domestic partners.

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### Eligible Institutions

Eligible organizations must be located in the United States or one of its possessions and be recognized as tax-exempt, non-profit educational or charitable organizations as defined under Section 501(c)(3) of the U.S. Internal Revenue Code. In addition, an eligible educational organization must be a secondary school, degree-granting two- or four-year private or public college or university, graduate school, or law, medical or dental school accredited by a recognized accrediting association.

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### What is an eligible gift?

Gifts must be actual contributions (not pledges), paid by check, cash, credit card or publicly traded securities (valued at the closing price on the day the gift is made) from personal funds.

The minimum gift under the program is \$50. The annual limit (which may be comprised of one or more gifts) for active employees and directors is \$5,000\*; for retirees, \$2,500\*.

\*Donations made by a spouse/domestic partner AND an employee/director/retiree cannot exceed the noted maximums combined.

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### What gifts are ineligible?

The following gifts are not eligible for matching under the program:

- ▶ Gifts which afford the contributor a personal benefit in return for the donation.
  - ▶ In-kind gifts, life income trusts, or real estate.
  - ▶ Indirect contributions to eligible non-profit organizations (tuition, student fees and loans, dues, insurance premium payments, etc.)
  - ▶ Gifts by payroll deduction.
  - ▶ Gifts for religious organizations, unless the specific program is nondenominational in nature and benefits a broad range of the community (e.g., soup kitchen, homeless shelter).
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### How much of an eligible participant's gift is matched?

Eligible gifts will be matched up to 100% if the annual program budget allows. If overall participant demand exceeds the budget, prorated adjustments in the matching amounts awarded to eligible organizations will be made. For example, if eligible gifts in a given year exceed the program budget by 25%, the gifts will be matched at 75% that year.

### When are matching gifts paid?

Matching gifts are paid annually at year-end. Eligible gifts received and confirmed by November 20th will be paid at year-end in the year they are received. Eligible gifts received and confirmed after November 20th will be included with the next year's matching gifts annual year-end payment.

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### How may I participate?

You may participate by filling out an ISO Matching Gift request form and sending it to the eligible institution of your choice for return to:

**ISO Matching Gifts Program**  
**Human Resources**  
**545 Washington Boulevard**  
**Jersey City, NJ 07310-1686**  
**FAX: 201-469-4141**

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### Questions about the ISO Matching Gifts Program

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Questions may be directed to:

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545 Washington Boulevard  
Jersey City, NJ 07310-1686

You may contact Janet Borino at 201-469-3032 or e-mail [JBorino@ISO.com](mailto:JBorino@ISO.com).