



## Matching Gifts to Education

### ***Program Objective***

The objective of the Matching Gifts to Education program is to encourage employees, retirees, and directors of Intel Corporation to make personal contributions to support education. The program is funded by the Intel Foundation.

### ***Who is eligible to have their gift matched?***

Eligible donors include:

- Blue-badge employees of Intel Corporation and their spouses
- Retired Intel employees (who retired under the official guidelines of Intel Corporation) and their spouses
- Active Directors of Intel Corporation

### ***What kinds of schools are eligible to receive matching gifts?***

Nonprofit organizations located in the United States or one of its possessions and recognized by the Internal Revenue Service as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS Code or as an instrumentality of a federal, state or local government as provided by Section 170(c)(1) of the Code.

Intel Foundation will match qualified employee contributions to any accredited school (generally recognized academic accrediting board) in the United States that is either a:

- Four year college or university (must be a degree-granting school)
- Technical or community college
- K-12 school (elementary or secondary, comprehensive, full-time school)
- School or university foundation (must have 501(c)(3) status with IRS)
- PTO's, PTA's and other support organizations for K-12 schools (must have the 501(c)(3) tax status).

Both publicly funded and private nonprofit independent schools are eligible. All schools that are not publicly funded must have status under Section 501(c)(3) of the tax code.

### ***What is a qualified contribution?***

The contribution must be a personal gift of check, credit card or stock (FMV on date of donation) by the eligible donor. It must be a personal gift, from the donor's personal funds, which has been paid and not simply pledged and must be made directly to the approved organization. Gifts must be verified by the recipient (the school) on the Matching Gift form submitted to the Intel Matching Gift program. Matching Gift requests must be received by the Program within one year of the date of the gift

### ***What is the Minimum gift?***

The minimum gift that will be matched by the Foundation is \$25. Matching Gift forms for gifts of less than \$25 will be returned to the employee and will not be matched by the Intel Foundation. All gifts are matched on a 1:1 basis

### ***What is the maximum amount the Intel Foundation will match per year?***

The maximum match is \$10,000 per calendar year per employee/retiree/director or per couple (employee and spouse). The limit will be calculated based on when the form is received by the Intel Foundation. All requests for matching funds must be made within 1 year of the gift. If both spouses are employees of Intel, each is eligible to match to a maximum of \$10,000 per year.

### ***What kinds of gifts will NOT be matched?***

Intel Foundation will NOT match:

- Gifts made by or through Community Trusts or similar organizations, including Charitable Remainder Trusts, Donor Advised Funds, or Family Foundations
- Gifts made in lieu of tuition payment for services
- Fees for service or tuition payments to tuition organizations
- Gifts made in lieu of pledges, tithes, or other financial commitments to a K-20 school
- Gifts for the private benefit of specific individuals
- Gifts made with funds given to the employee or retiree for donation purposes by any other individuals
- Membership fees for which benefits are received
- Dues to alumni(ae) or similar groups
- Payment for auction items
- Subscription fees for publications
- Gifts of real or personal property
- Gifts made to support extra curricular or intercollegiate athletics or athletic scholarships
- Gifts to public broadcasting stations (radio and television), even if located on a university campus
- Cumulative gifts from several individuals reported as one contribution

### ***How do I get a Matching Gift to Education form to submit a request?***

The form may be obtained at:

- Intel employees: Intranet at <http://education.intel.com/education2/involved/MatchingGiftform.doc>
- Intel retirees: Internet at <http://www.intel.com/employee/retiree/benefits/RetireeMatchingGiftform.doc>
- Emailing the Intel Foundation at [intel.foundation@intel.com](mailto:intel.foundation@intel.com)

If you have no computer access, you may contact the Intel Foundation at 503-456-1515.

### ***What is the process for having my gift matched?***

The donor should:

- Complete Section 1 of the *original* application form
- Mail the *original* application form, with the donation and any other necessary documentation, to the institution of your choice that meets the criteria listed in the guidelines

The school should:

- Complete Section 2 of the application form.
- The authorized officer of the charity must verify the donation, sign the application form and return the *original* form to the address listed on the form.

Any Matching Gift to Education forms received that reflect gifts that are not eligible for a match will be returned to the employee with a letter of explanation.

### ***Matching Gift Payments***

Matching checks are distributed by the Intel Foundation at the end of each month following each quarter. The completed Matching Gift to Education form must be received by the Intel Foundation by the program cut-off date to be included in that quarter's matching check disbursement:

Quarter	Date form must reach Intel Foundation (Closing Date for the quarter)	Foundation Payment Date to Schools
Q1	March 24 <sup>th</sup>	April 30 <sup>th</sup>
Q2	June 25 <sup>th</sup>	July 31 <sup>st</sup>
Q3	September 24 <sup>th</sup>	October 31 <sup>st</sup>
Q4	December 15 <sup>th</sup>	January 31 <sup>st</sup>

***Special consideration***

The Intel Foundation reserves the right to determine whether any gift shall be matched. The Intel Foundation may change, revoke, suspend, or terminate this program at any time.

Organizations approved in the past may not qualify for the Intel Matching Gifts to Education Program in subsequent years if new information is received regarding the loss of their tax status or change in their mission or their programs that indicate the organization now falls outside of the Intel Matching Gifts to Education Program guidelines. However, absent such new information, previously approved organizations are likely to be approved. If you have any questions or concerns, prior to making your initial contribution, please contact the Matching Gifts Program via email at [intel.foundation@intel.com](mailto:intel.foundation@intel.com).



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### Procedure

**Step 1:** Donor should fill out Section One and send both the form and the contribution to the school.

**Step 2:** School completes Section Two and returns the form to:

**Intel Foundation, AG6-601  
5200 N.E. Elam Young Parkway  
Hillsboro, OR 97124-6497**

**Step 3:** The Intel Foundation will verify information on the form and authorize payment to the eligible school. At the end of each quarter, the donor will be notified when the gift has been matched.

### Section One: To Be Completed By The Donor (please print or type)

Employee/Director Name

Last First MI

Donor Name (if different from employee)

Last First MI

WW ID#

Mail Stop:

Phone Number (with area code)

Donor Status:

☐ Employee

☐ Spouse

☐ Director

School Name

School location (city, state)

Gift was designated to the following specific department or fund (optional)

Stock/Check/Credit Card Amount

Amount of Gift (write out for either cash, credit card or stock)

Amount to Match (if different than original gift)

\$ Dollars

I certify that at the time of this gift I qualify as an eligible employee, spouse, or director of Intel Corporation. I further certify that this gift is my personal contribution and that neither I nor any member of my family nor any individual designated by me has received or will accept a benefit of more than nominal monetary value in return for or as a result of this gift or its matching by the Intel Foundation. I certify that I have not requested matching gift funds from any other source.

Signature of donor \_\_\_\_\_ Date \_\_\_\_\_

*\* Failure to sign this form may delay the form to be processed*

### Section Two: To Be Completed By the School

If this is your first matching gift request to the Intel Matching Gifts to Education Program, please enclose a copy of your Internal Revenue Service 501(c)(3) IRS determination letter and a brief description of your organization's primary mission statement or purpose. Forward this information with the form to the address located at the top of this form.

School Name

Employer Identification Number (EIN)

Address

Telephone, Including Area Code:

City, State, Zip

Email:

Tax Status:

☐ Publicly funded institution

☐ School foundation or independent institution with 501(c)(3) status

Type of Institution:

☐ Four year college or university

☐ Technical/community college

☐ K-12 (elementary or secondary)

☐ School/university foundation

Amount of Gift \$:

Tax Deductible Amount \$:

Date Gift Received:

I certify that this gift was made by the individual named above, and has been received by this institution and that this institution has not provided and will not provide any benefit of more than nominal monetary value to any member of the donor's family, or to any individual designated by the donor in return for or as a result of this gift or its matching by the Intel Matching Gifts to Education Program. I also certify that this organization is in full compliance with the anti-terrorism laws legislated by the USA Patriot Act. In addition, by countersigning this Matching Gift Application, I agree that this organization will not promote or engage in violence, terrorism, bigotry or the destruction of any state, nor will it make sub-grants to any entity that engages in these activities.

Printed Name of Authorized Officer:

Signature of Authorized Officer

Title of Authorized Officer:

Date:

Phone of Authorized Officer: