



# SANDMEYER STEEL COMPANY

## MATCHING GIFT PROGRAM

PART A – TO BE COMPLETED BY EMPLOYEE/RETIREE (PLEASE PRINT OR TYPE)

Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_  
Number Street City State Zip

Name of Recipient Organization \_\_\_\_\_

Special Purpose (if applicable) \_\_\_\_\_

Location \_\_\_\_\_  
City State Zip Telephone

Contribution Amount \$ \_\_\_\_\_ Form of Gift:  Check  Credit Card

Credit Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

*Certification of Employee/Retiree: I certify that I have read the requirements set forth in the Matching Gift Program Requirements (see next page) and that the recipient organization and this contribution are fully eligible under the requirements.*

Signature of Employee/Retiree \_\_\_\_\_ Date \_\_\_\_\_

*Please return a copy to Audrey T. Mento to register the gift.*

PART B – TO BE COMPLETED BY RECIPIENT ORGANIZATION AND SENT TO SANDMEYER STEEL COMPANY (PLEASE PRINT OR TYPE)

Legal Name of Recipient Organization \_\_\_\_\_

Address \_\_\_\_\_  
Number Street City State Zip

Telephone \_\_\_\_\_ EIN \_\_\_\_\_

Fax \_\_\_\_\_ Email \_\_\_\_\_

Website \_\_\_\_\_ Date of Gift \_\_\_\_\_

Gift Amount \$ \_\_\_\_\_ Tax Deductible Amount \$ \_\_\_\_\_

*Certification of Recipient Organization: I certify that the gift described above was received. I certify that I have read the requirements set forth in the Matching Gift Program Requirements on next page and that the recipient organization and this contribution are fully eligible under the requirements.*

Print Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

**All organizations must submit the following information if this is your first request for Matching Gift funds:**

- 501(c)(3) determination letters from IRS
- Brochure describing organization
- Letter of regional accreditation (for private educational institutions only)

**Organization return forms to:**

Audrey T. Mento  
Sandmeyer Steel Company  
One Sandmeyer Lane; Philadelphia, PA 19116  
215-698-4105 – [AMento@SandmeyerSteel.com](mailto:AMento@SandmeyerSteel.com)

For Office Use Only: Submitted for processing on \_\_\_\_\_ Submitted to Fidelity by \_\_\_\_\_ Date \_\_\_\_\_  
Grant ID: \_\_\_\_\_ Date \_\_\_\_\_ Check Number: \_\_\_\_\_ Date \_\_\_\_\_

## **MATCHING GIFT PROGRAM REQUIREMENTS**

### **The Program**

Sandmeyer Steel Company ("Company") established a corporate Matching Gift Program to encourage and match gifts made by employees and retirees to educational institutions and other charitable organizations. Matching gifts will be made by The Sandmeyer Steel Company Foundation ("Foundation"), a donor-advised fund established in 2006 by the Company to promote charitable giving by the Company and its employees and retirees.

**Eligible Participants** – Eligible participants are limited to:

- Employees of the Company, on the date of the gift; and
- Persons who have retired directly from the Company.

**Eligible Recipient Organizations** – Eligible organizations are charitable organizations that are:

- Tax-exempt under Internal Revenue Code ("Code") Section 501(c)(3);
- Public charities as described in Code Section 509(a)(1) or (a)(2) (but excluding the organization types listed in the "Ineligible Recipient Organizations" section below).

**Ineligible Recipient Organizations** – Some types of organizations are ineligible for funds from the Matching Gift Program:

- United Ways (e.g. United Way of Southeastern Pennsylvania);
- Organizations primarily promoting religious purposes or those requiring participants to be of a certain faith in order to participate in programs or receive services;
- Private or operating foundations, supporting organizations, donor-advised funds, or personal trusts that do not qualify as public charities;
- Civic groups that are not tax exempt under Section 501(c)(3) of the Code, including fraternal, social, union, or veteran organizations;
- Non-U.S. charitable organizations (organizations not formed under the laws of the United States and its territories);
- Political organizations or organizations that promote a political party or candidate or that advocate particular public policy positions;
- Organizations that impermissibly discriminate on the basis of a person's race, color, religion, national origin, sex (including pregnancy), sexual orientation, age, disability, veteran status, or other characteristic protected by law;
- Organizations whose philosophy and mission may conflict with Company policy positions or could potentially cause negative publicity for the Company.

### **Eligible Gifts**

- Gifts must be a minimum of \$50, as required by Fidelity Charitable Gift Fund, and in \$50 increments and must be paid directly to the eligible organization (please note exceptions in the "Ineligible Gifts" section below).
- Gifts must be current contributions from the donor's own assets. Gift must be made by check or by credit card or by transfer of marketable securities, not merely pledged. A matching gift cannot be used to satisfy a personal pledge (e.g., a pledge of \$2,000 cannot be satisfied by \$1,000 from the donor and \$1,000 from the Foundation match).
- Gifts may also be made by current payment from an entity such as a trust, private or family foundation, or donor-advised fund if that entity has been funded solely by an eligible Company participant or jointly by the participant and his/her spouse. Note that gifts made to such an entity cannot be matched.

### **Ineligible Gifts**

- Charitable contributions made as part of a United Way campaign;
- Charitable contributions made via payroll deduction;
- Charitable contributions made as bequests or through entities such as charitable remainder or lead trusts or charitable gift annuities;
- Real estate or in-kind charitable contributions;
- Charitable contributions given for an event or program where all or part is required for participation (e.g., walk-a-thons, benefit dinners, golf tournaments, etc.);
- Contributions to individuals or to charities that benefit a particular individual;
- Contributions that result in a material benefit or privilege for the Company, an employee or retiree, or his/her family (e.g., benefit dinners, memberships, auction items, event tickets, subscriptions, tuition payments or other student fees, preferential treatment, company sponsorship benefits, etc.).

### **Requesting a Matching Gift**

- The Foundation will match \$1 for each \$1 of eligible employee or retiree contributions to eligible public charities. The minimum employee or retiree contribution to any one organization that will be matched is \$50. Contributions must be in \$50 increments. The maximum match per employee or retiree per calendar year is \$10,000, and the maximum number of gifts per employee or retiree is 15 per calendar year.
- To arrange for a matching gift, employees and retirees should obtain a Matching Gift Program Request Form from the Company Human Resources Department and complete Part A. Submit a copy of the form to Audrey T. Mento to register the gift request. After registered, employees and retirees should submit the original form, along with their gift, to the eligible recipient organization.
- Gifts must be registered as soon as possible, but no later than January 31<sup>st</sup> in the year after the gift was made.
- An authorized official of the recipient organization should complete Part B and return the form to Audrey T. Mento. Upon receipt, the eligibility of the organization and the gift will be verified, and it will be recommended to the Foundation that it match the gift.
- The recipient organization must confirm receipt of the gift within 90 days of the date the gift request is registered. Note that the recipient organization must also confirm compliance with the eligibility criteria.
- The Foundation matching gift checks will be sent directly to the recipient organization or institution, usually within 20 business days of the gift being confirmed and approved.
- Employees and retirees arranging for a matching gift receive a confirmation from the Company after their contribution has been matched.

### **Matching Gift Program Administration**

The Matching Gift Program is not part of the Company's employee/retiree benefits program but is offered as a public service by the Company. The Company administers this program, including participant and recipient eligibility, and may amend, suspend, or terminate the Program at any time. The interpretation and administration of this program is determined by the Company's officers whose decision is final. For a complete list of the requirements, please refer to the Matching Gift Program Document which governs the administration of the program.

**"SANDMEYER Serves"**