

# The H & R Block Foundation Matching Gift Program

## Instructions for Donor:

- Review program guidelines and complete Part 1 of this fillable form
- Mail this form, along with your gift, directly to the educational institution

### Part 1 – Donor

\_\_\_\_\_  
Name

\_\_\_\_\_  
Employee ID                      Daytime Phone Number

\_\_\_\_\_  
Work Street Address

\_\_\_\_\_  
City                                  State/Province                      Zip

\_\_\_\_\_  
E-mail Address

I prefer that my gift be restricted to:

\_\_\_\_\_

I prefer that my gift be unrestricted

I acknowledge that I am a regular, full-time employee\* of a participating H&R Block subsidiary (to see a list of participating subsidiaries, please see program guidelines on page 2).

*\*An employee who works 40 or more hours per week on a non-seasonal continuing basis and is classified as a regular, full-time employee within H&R Block's PeopleSoft system.*

I hereby affirm that the information above is accurate and that this gift was not used for the following: (1) payments for tuition, books, loans, or student fees; (2) subscriptions for publications; (3) pooled gifts made by an eligible donor on behalf of ineligible contributors; (4) unpaid pledges; or (5) for matching funds that would provide more than the incidental benefit of recognition for the gift to me or my family. Additionally, I hereby authorize the recipient educational institution to report this gift to the Foundation's Matching Gift Program.

\_\_\_\_\_  
Signature of Associate                                  Date

**Mail this form, along with your gift, directly to the educational institution**

## Instructions for Educational Institution:

- Complete Part 2 of the form
- Mail this form back to The H & R Block Foundation

### Part 2 – Educational Institution

\_\_\_\_\_  
Organization Name

\_\_\_\_\_  
Employer Identification Number

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City                                  State/Province                      Zip

\_\_\_\_\_  
School Accreditation

\_\_\_\_\_  
Amount of gift                                  Date of gift

**Tax deductible portion (if different from above)**

I hereby confirm that (i) the recipient organization has received the gift in the form and amount described above, and (ii), the above information concerning its status as an educational institution is true and correct. In addition, the Internal Revenue Service has recognized this institution as either an organization to which contributions are tax deductible or as a registered charity under Canada's Income Tax Act determined in good faith by The H & R Block Foundation to be an organization described in Internal Revenue Code sections 501(c)(3) or 509 (a)(1), (2), or (3) in anticipation of receiving The H & R Block Foundation gift. I further certify that no goods or services will be provided to The H & R Block Foundation in consideration of the matching gift.

\_\_\_\_\_  
Signature of Organization Representative

\_\_\_\_\_  
Name and Title

\_\_\_\_\_  
Date

## Mail completed form to:

**The H & R Block Foundation  
One H&R Block Way  
Kansas City, MO 64105**

## For more information contact:

(816) 854-4363  
foundation@hrblock.com

For more information go to [www.hrblockfoundation.org](http://www.hrblockfoundation.org)

# The H & R Block Foundation Matching Gift Program

## PROGRAM OVERVIEW

H&R Block, Inc. strongly believes in civic involvement and corporate responsibility. One of the ways this commitment is demonstrated is through The H & R Block Foundation Matching Gift Program. The Matching Gift Program gives eligible associates of H&R Block subsidiaries an opportunity to determine how Foundation funds are allocated and allows associates to make significantly larger charitable contributions to educational institutions.

**WHO MAY PARTICIPATE?** To be eligible, you must be considered a regular, full-time employee\* of a participating H&R Block subsidiary. Participating subsidiaries include: H&R Block Enterprises, LLC; HRB Green Resources, LLC; HRB International Management, LLC; HRB Resources, LLC; HRB Professional Resources, LLC; HRB Technology, LLC; and Sand Canyon Corporation.

*\* An employee who works 40 or more hours per week on a non-seasonal continuing basis and is classified as a regular, full-time employee within H&R Block's PeopleSoft system.*

**HOW DO I PARTICIPATE IN THE PROGRAM?** Complete and sign Part 1 of the Matching Gift form. Send it, along with your gift, to the eligible educational institution you have chosen to receive your gift. The institution must complete and sign Part 2 of the form to confirm its eligibility and receipt of your gift and forward it to the Foundation. The H & R Block Foundation will send a matching gift to each eligible institution and notify you that your gift has been matched. The deadline for submission of the previous year's gifts is January 31.

**WHAT GIFTS ARE ELIGIBLE FOR MATCHING FUNDS?** Gifts must be paid, not merely pledged. Your gift must be cash or a check in the amount of \$100 or more, or stocks or bonds that have a market value of \$100 or more. The Foundation matches gifts on a one-to-one ratio.

**IS THERE A LIMIT ON THE AMOUNT OF MATCHING GIFTS?** Each qualified individual is eligible to have up to \$1,000 in gifts matched each calendar year. Once your gifts total \$1,000, additional gifts that are made in the same year will not be eligible for a matching gift.

**WHAT ORGANIZATIONS MAY RECEIVE MATCHING GIFTS?** These types of organizations are eligible:

**A college or university located in the United States** which is accredited by one of the following regional accrediting agencies: Middle States Association of Colleges and Schools, North Central Association of Colleges and Secondary Schools, New England Association of Schools and Colleges, Northwestern Association of Schools and Colleges, Southern Association of Colleges and Schools or Western Association of Schools and Colleges, or a school listed as an institution of higher education in the Higher Education Directory (published by Higher Education Publications, Inc.);

**A college or university located in Canada** which is listed as an institution of higher education in the most recent edition of Directory of Canadian Universities (published by the Association of Universities and Colleges of Canada);

**A nonprofit private or independent secondary school located in the United States or Canada** which is accredited by one of the regional agencies listed above, or by an accrediting program approved by the National Association of Independent Schools (NAIS); or listed as an independent or secondary school in the most recent edition of Schools Abroad of Interest to Americans, or The Handbook of Private Schools, (both published by Porter Sargent Publishers, Inc., Boston, Massachusetts) or The International Registry of Regionally Accredited Schools, (published by CORSAC) or Private Independent Schools (published by Bunting and Lyon, Inc., Wallingford, Connecticut);

**For Canadian organizations**, the Internal Revenue Service must recognize the educational institution as either an organization to which contributions are tax-deductible or as a registered charity under Canada's Income Tax Act determined in good faith by The H & R Block Foundation to be an organization described in Internal Revenue Code sections 501(c)(3) or 509(a)(1), (2), or (3).

**ARE THERE CONTRIBUTIONS THAT ARE INELIGIBLE FOR MATCHING GIFTS?** Contributions ineligible for matching include: (1) payments for tuition, books, loans, or student fees; (2) subscriptions for publications; (3) pooled gifts made by an eligible donor on behalf of ineligible contributors; (4) unpaid pledges; (5) gifts for which the matching funds would provide more than the incidental benefit of recognition for the gift to the donor or the donor's family.

**WHOM SHOULD I CONTACT WITH QUESTIONS?** If you have any questions regarding The H & R Block Foundation's Matching Gift Program, please contact Foundation staff:

**(816) 854-4363**  
**foundation@hrblock.com**