

MATCHING GIFTS PROGRAM GIFT FORM

Deloitte Foundation

(A separate gift form must be completed for each college or university.)

SECTION A - TO BE COMPLETED BY PARTNER/EMPLOYEE AND FORWARDED TO THE SCHOOL WITH YOUR GIFT

(Please type or print clearly in ink.)

PARTNER/EMPLOYEE DONOR INFORMATION

Name: _____

Office Location (City): _____

Function: _____
(AERS, Consulting, FAS, Shared Services, Tax)

Office Phone #: _____

Office Fax #: _____

Home Phone #: _____

Level: _____
(Partner, Principal, Firm Director, Manager, Staff)

Status (for partner/principal/firm directors only):

Active Retired

Retirement date: _____

COLLEGE/UNIVERSITY

Name: _____

City/State: _____

Alumnus of School? Yes No

Degree: _____ Date Received: _____

GIFT DATA

Date of Gift: _____
(Month, Day, Year)

Amount: \$ _____

Note: The minimum for each contribution, per school, per fiscal year, that is eligible for matching is \$50 for employees and \$250 for partners/principals/firm directors.

Form of Gift:

Cash Check Charge Securities

_____ Shares of _____

Valued at \$ _____ a share

Gift Designation: *The Foundation encourages designation of contributions to academic programs/funds. (see donor instructions for eligibility criteria)*

Brief description of gift designation: _____

I hereby certify that the information submitted by me and set forth above is correct and my gift fully complies with program provisions. (MUST BE SIGNED BY ELIGIBLE DONOR—REQUIRED FOR PROCESSING)

Signature: _____

Date signed: _____

PROCEDURE

- Partner/employee donor should complete section A (this page) and mail sections A & B of this form with his or her contribution to the school. By signing in the space above, the donor certifies that such gift complies with the provisions of the Program and authorizes the school to report such gift to the Deloitte Foundation.
- An authorized officer of the school should complete and sign section B, thereby certifying that the contribution has been received and that the gift complies with the provisions of the Program. The school should then mail sections A & B of the form to the Deloitte Foundation Matching Gifts Coordinator, as soon as possible but no later than May 31 of each year.
- The Foundation will process the form and authorize payment of matching contributions in accordance with Program guidelines. Once a year, in October, eligible gifts for a college/university will be matched provided that total eligible contributions from Deloitte personnel are such that the Foundation match will total \$1,000 or more during the fiscal year. Matching checks will be made payable directly to approved colleges/universities. A listing of the name, designation, and amount contributed by each donor will also be provided to each school with a record of gifts matched.

COLLEGES/UNIVERSITIES: PLEASE COMPLETE SECTION B OF THIS FORM.

SECTION B - TO BE COMPLETED BY COLLEGE/UNIVERSITY. PLEASE RETURN SECTIONS A & B OF THIS FORM AND IRS RULING TO THE DELOITTE FOUNDATION NO LATER THAN MAY 31. (Please type or print clearly in ink.)

I hereby confirm that this institution is tax exempt under the Internal Revenue Code and certify that the amount of \$ _____ was received on _____ (date) and will be used to support the primary objectives of the institution and fully complies with the program provisions as stated below. **The employee's gift was designated to the following academic program, fund or department (required for processing—please note that gifts to athletic or other non-academic funds are not eligible for match):** _____

Signature of Financial Officer (required for processing--not a stamp)

Date

College/University Name

Tax I.D. Number

Full Name and Title of Financial Officer: _____

Department to Which Check Should Be Directed: _____

Street Address or Room/Building: _____

City/State/Zip: _____ Contact Phone Number: _____

COLLEGE/UNIVERSITY PROGRAM INSTRUCTIONS

The Deloitte Foundation will match gifts of U.S. Deloitte personnel to **academic programs** in graduate schools and baccalaureate degree-granting colleges in the United States and Puerto Rico, which have tax-exempt status under the Internal Revenue Code. The program will match any eligible gift made directly to an approved college/university by active U.S. employees, and active or retired U.S. partners, principals and firm directors of Deloitte during the fiscal year **(June 1- May 31)**, subject to the following guidelines:

Eligible Contributions

Gifts must be paid, not merely pledged, directly to an approved college/university and must be made by cash, check, credit card charge or in marketable securities. The value of the securities, for the purpose of the Program, will be valued as of the date they are released by the contributor. **Gifts made to institutions of higher education through the United Way or other organizations are not eligible for matching.**

The minimum for each contribution, per school, per fiscal year, must be no less than \$50 for employees and \$250 for active or retired partners, principals and firm directors. The Foundation will match aggregate individual contributions to eligible recipient schools, which are made during the Foundation's fiscal year (June 1 to May 31), up to a fiscal year maximum of \$5,000 per donor. Individual gifts to colleges/universities with which the firm maintains a significant recruiting relationship (as determined by the Foundation) may be matched up to \$5,000 per donor, per fiscal year. Individual gifts to all other colleges/universities may be matched up to \$1,000 per donor, per school. **Gifts to an eligible college/university will be matched only if total eligible contributions from Deloitte personnel are such that the Foundation match will total \$1,000 or more during the fiscal year. Gifts will be matched on a 1:1 basis.**

The Foundation's matching gift will follow the donor's contribution designation. However, if undesignated, the Foundation reserves the right to designate the matching portion of the total contribution to programs, which support the objectives of the Foundation. Matching will not be provided for contributions representing spousal gifts, testamentary bequests, alumni dues, athletic programs or activities, payment of tuition or student fees, gifts of future interest, life insurance premiums on policies naming the school or any program therein as beneficiary, or any other gift which does not meet the requirements of an eligible contribution as set forth above.

Contributions may be made to an eligible college/university at any time during the calendar year; however, the act of matching such contributions by the Foundation will occur annually. **All applications for the Program must be completed and returned to the Foundation on or before May 31 of each year for matching in October.**

Procedure

An authorized officer of the college/university should complete and sign section B above, thereby certifying that the contribution has been received and that, to his/her knowledge, the gift complies with the provisions of the Program. Thereafter, the form should be mailed to the Deloitte Foundation Matching Gifts Coordinator at the address below, as soon as possible but no later than May 31 of each year. **In addition, an IRS ruling should be submitted to the Deloitte Foundation one time annually.**

The Foundation will review the form and will authorize payment of matching contributions in accordance with the provisions of the Program. Once a year, after the Foundation's year end of May 31, eligible gifts for a college/university will be matched provided that total eligible contributions from Deloitte personnel are such that the Foundation match will total \$1,000 or more during the fiscal year. Matching checks will be made payable directly to approved colleges/universities. A listing of the name, designation, and amount contributed by each donor will be included to provide each school with a record of gifts matched. **Upon receipt of the matching contribution, the school must provide the Deloitte Foundation with a written acknowledgment of the gift in compliance with the Internal Revenue Code.**

Address requests for further information and all correspondence relating to the Program to: Matching Gifts Coordinator, Deloitte Foundation, Ten Westport Road, P.O. Box 820, Wilton, CT 06897-0820, (203-761-3248).

(These instructions and the attached school list are supplemental information for Deloitte partners and employees. **Please discard these pages before forwarding sections A & B of the matching gifts form to the university.**)

**DELOITTE FOUNDATION MATCHING GIFTS PROGRAM GUIDELINES
DONOR INSTRUCTIONS**

To assist degree-granting colleges and universities, which provide education relevant to the profession and our firm, the Deloitte Foundation will match gifts of Deloitte personnel to **academic programs** at eligible institutions of higher education. The Program will match any eligible gift made directly by an eligible individual to an approved college/university during the fiscal year (**June 1 - May 31**), subject to the following guidelines:

Eligible Contributors: U.S. active employees, and U.S. active or retired partners, principals and firm directors of Deloitte.

Eligible Colleges/Universities: Graduate schools and baccalaureate degree-granting colleges and universities in the United States and Puerto Rico, which have tax-exempt status under the Internal Revenue Code.

A tax-exempt fund, foundation, or association which is an integral part of an approved institution or provides support directly to an approved institution, will be considered if the gift will be applied directly to support the institution's primary educational objectives.

Determination of a college or university's initial and continuing participation shall be made by the Foundation.

Eligible Contributions: Gifts must be paid, not merely pledged, **directly** to an approved institution and must be made by cash, check, credit card charge or in marketable securities. The value of the securities, for the purpose of the Program, will be valued as of the date they are released by the contributor. **Gifts made to institutions of higher education through the United Way or other organizations are not eligible for matching.**

The minimum for each contribution, per school, per fiscal year, must be no less than \$50 for employees and \$250 for active or retired partners, principals and firm directors. The Foundation will match aggregate individual contributions to eligible colleges/universities, which are made during the Foundation's fiscal year (June 1 to May 31), up to a fiscal year maximum of \$5,000 per donor. Individual gifts to colleges/universities with which the firm maintains a significant recruiting relationship (as determined by the Foundation -- please contact the Matching Gifts Coordinator at 203-761-3248 if you have any questions regarding the firm's recruiting relationship with a particular school) may be matched up to \$5,000 per donor, per fiscal year. Individual gifts to all other colleges/universities may be matched up to \$1,000 per donor, per school. Individual contributions to Strategic Schools (indicated by shading on the attached school list) will be matched up to an additional \$5,000 per school, per donor. **Gifts to an eligible college/university will be matched only if total eligible contributions from Deloitte personnel are such that the Foundation match will total \$1,000 or more during the fiscal year. Gifts will be matched on a 1:1 basis.**

The Foundation encourages Deloitte partners and employees to designate their contributions to academic programs, funds, or scholarships relevant to the profession and our firm. Such programs include those within a School or Department of Accounting, Business, Business Administration, Law, Taxation, Commerce, Finance, Economics, Management, Computer Science, Decision Science, Mathematics, Health Administration, or Public Administration.

The Foundation's matching gift will follow the donor's contribution designation. However, if undesignated, the Foundation reserves the right to designate the matching portion of the total contribution to programs, which support the objectives of the Foundation. Matching will **not** be provided for contributions representing spousal gifts, testamentary bequests, alumni dues, athletic programs or activities, payment of tuition or student fees, gifts of future interest, life insurance premiums on policies naming the school or any program therein as beneficiary, or any other gift which does not meet the requirements of an eligible contribution as set forth above.

Procedure: Contributions may be made to an eligible college/university at any time during the calendar year; however, the act of matching such contributions by the Foundation will occur annually. Section A of the matching form must be completed and signed by the partner/employee. Sections A & B should then be mailed by the partner/employee with his or her contribution to the school. The college/university then completes and signs section B and mails sections A & B of the form to the Deloitte Foundation Matching Gifts Coordinator at the address noted below (all matching gift forms must be completed and returned to the Foundation on or before **May 31** of each year for matching in October). **Address requests for further information and all correspondence relating to the Program to: Matching Gifts Coordinator, Deloitte Foundation, Ten Westport Road, P.O. Box 820, Wilton, CT 06897-0820, (203-761-3248).**

**DELOITTE FOUNDATION
COLLEGES/UNIVERSITIES ELIGIBLE FOR MATCHING GIFTS UP TO
A MAXIMUM OF \$5,000 PER INDIVIDUAL (SCHOOLS NOT INCLUDED ON THIS LIST
WILL BE ELIGIBLE FOR MATCHING UP TO \$1,000/INDIVIDUAL)**

Alabama, University of – Tuscaloosa
 American University
 Appalachian State University
 Arizona State University – Tempe
 Arizona, University of – Tucson
 Arkansas, University of – Fayetteville
 Auburn University – Auburn
 Babson College
 Baruch College – CUNY
 Baylor University
 Bentley College – MA
 Boise State University
 Boston College
 Boston University
 Bowling Green State University
 Brigham Young University – Utah
 Bryant College
 Bucknell University
 Butler University
 California Polytechnic State – San Luis Obispo
 California State University – Fresno
 California State University – Fullerton
 California State University – Hayward
 California State University – Long Beach
 California State University – Northridge
 California, University of – Berkeley
 California, University of – Irvine
 California, University of – LA
 California, University of – San Diego
 California, University of – Santa Barbara
 California, University of – Santa Cruz
 Carnegie Mellon University
 Case Western Reserve University
 Central Florida, University of – Orlando
 Central Michigan University
 Chicago, University of
 Cincinnati, University of
 Claremont McKenna College
 Clark Atlanta University
 Clemson University
 Colorado State University
 Colorado, University of – Boulder
 Columbia University
 Connecticut, University of
 Cornell University
 Creighton University
 Dartmouth College
 Dayton, University of
 De Paul University
 Delaware, University of – Newark
 Denver, University of
 Drake University
 Drexel University – PA

Duke University
 Duquesne University
 Eastern Michigan University
 Emory University
 Fairfield University – CT
 Fairleigh Dickinson University
 Florida A&M University
 Florida Atlantic University
 Florida International University
 Florida State University – Tallahassee
 Florida, University of – Gainesville
 Fordham University
 Franklin & Marshall College
 Georgetown University
 George Fox University
 George Mason University
 George Washington University
 Georgia Institute of Technology
 Georgia State University – Atlanta
 Georgia, University of – Athens
 Golden Gate University
 Harvard University
 Hawaii, University of – Manoa/Honolulu
 Hofstra University
 Holy Cross, College of the
 Houston, University of – University Park
 Howard University
 Illinois, University of – Urbana/Champaign
 Indiana University – Bloomington
 Iowa, University of – Iowa City
 Iowa State University
 James Madison University
 John Carroll University
 Kansas State University
 Kansas, University of – Lawrence
 Kent State University
 Kentucky, University of – Lexington
 Lehigh University
 Louisiana State University – Baton Rouge
 Loyola Marymount University – CA
 Loyola University – IL
 Marquette University
 Maryland, University of – College Park
 Massachusetts Institute of Technology
 Massachusetts, University of – Amherst
 Miami University – Oxford, OH
 Miami, University of – FL
 Michigan State University – East Lansing
 Michigan, University of – Ann Arbor
 Minnesota, University of – Minneapolis
 Mississippi, University of
 Mississippi State University
 Missouri, University of – Columbia

Montana State University
Montclair State University
Morehouse College
Mount Saint Mary's College – MD
Muhlenberg College – PA
Nebraska, University of – Lincoln
Nebraska, University of – Omaha
Nevada, University of – Las Vegas
New Jersey, College of
New Orleans, University of
New York University
North Carolina A&T State Univ. – Greensboro
North Carolina State University
North Carolina, University of – Chapel Hill
North Carolina, University of – Wilmington
North Dakota, University of
North Florida, University of
North Texas, University of
Northeastern University
Northern Illinois University
Northern Iowa, University of
Northwestern University
Notre Dame, University of
Ohio State University – Columbus
Ohio University
Oklahoma State University – Stillwater
Oklahoma, University of – Norman
Oral Roberts University
Oregon, University of
Pace University – NY
Pennsylvania State University – Univ. Park
Pennsylvania, University of
Pepperdine University
Pittsburgh, University of
Purdue University
Queens College – CUNY
Quinnipiac University - CT
Rensselaer Polytechnic Institute
Rice University
Richmond, University of
Rider University
Rutgers University – New Brunswick
Rutgers University – Newark
Saint John's University – NY
Saint John's Univ./Coll. of Saint Benedict - MN
Saint Louis University – MO
Saint Thomas, University of – MN
Sam Houston State University
San Diego State University
San Diego, University of

San Francisco, University of
San Jose State University
Santa Clara University
Scranton, University of
Seattle University
Seton Hall University – South Orange
Sonoma State University
South Carolina, University of – Columbia
South Dakota, University of
South Florida, University of
Southern California, University of
Southern Methodist University
Southern Utah University
Stanford University
State University of New York – Albany
State University of New York – Binghamton
State University of New York – Buffalo
Stephen F. Austin State University
Syracuse University
Temple University
Tennessee, University of – Knoxville
Texas A&M University
Texas Christian University
Texas Tech University
Texas, University of – Austin
Tulane University
Utah, University of – Salt Lake City
Vanderbilt University
Villanova University
Virginia Commonwealth University
Virginia Polytechnic Institute & State Univ.
Virginia, University of
Wake Forest University
Walsh College of Accounting & Business – MI
Washington State University
Washington University - St. Louis
Washington, University of – Seattle
Weber State University
Wellesley College - MA
West Virginia University
Western Michigan University
William & Mary, College of
Wisconsin, University of – Eau Claire
Wisconsin, University of – Madison
Wisconsin, University of – Milwaukee
Wisconsin, University of – Whitewater
Wright State University – OH
Xavier University
Yeshiva University – NY