

Educational Matching Gift Program Guidelines



As part of our year-round commitment to our communities, Wells Fargo is proud to offer the Wells Fargo Educational Matching Gift Program to encourage and support the generosity and community involvement of team members. Through this program, team members may request — at any time, year-round — a matching gift from Wells Fargo following their personal donation to an eligible charitable organization.

The program

At Wells Fargo, we recognize that our company, stockholders, team members, and communities all benefit when educational institutions are supported. The Educational Matching Gift Program matches team members' donations to any eligible accredited school, dollar for dollar, from \$25 up to \$5,000 per team member per calendar year.

Eligible participants

All active regular, part-time, or flexible team members of Wells Fargo or any of its subsidiaries are eligible and encouraged to participate. Active executive board members are also eligible.

Eligible organizations

Accredited educational institutions:

- Public and private
- Prekindergarten
- Elementary schools
- Secondary schools
- Junior colleges
- Colleges
- Graduate schools
- Technical or vocational schools
- School districts
- Educational foundations that financially support schools located within the United States

Please note, all schools must be nonprofit tax-exempt organizations, designated 501(c)(3) by the IRS.

Wells Fargo's matching gift will be considered as unrestricted general support to the school.

Eligible donations

- The donation must be from the team member's personal funds, which have been paid directly to an approved school.
- The minimum eligible gift for matching is \$25. For installment gifts, each match request must be submitted separately and meet the \$25 minimum gift requirement.

- Gifts must be in the form of check, credit card, or stocks or marketable securities with a quoted market value. Checks written from a family foundation or trust are not eligible for a match.
- Gifts of stocks or securities are valued based on the average of the high and low on the date of gift. No other form of personal or real property will be matched.

Matching gift disbursements are made by our program administrator, JK Group, Inc., based in Princeton, New Jersey. Eligible gifts are processed monthly.

Contributions must be given, not just pledged. Eligible participants may request that a gift be matched up to one calendar year after the gift has been made. Wells Fargo reserves the right to approve or decline match requests.

Please direct matching gift questions to **1-888-518-4438** or email wellsfargo@easymatch.com.

Noneligible donations

- Gifts made in lieu of tuition payments, fees, repayment of loans, or charges fixed by a school as a condition of enrollment
- Fees associated with club and alumni membership or other fees incurred while in attendance at a school
- Subscription, membership, or any other fees for which benefits are received
- Gifts of real or personal property
- Cumulative gifts from several individuals reported as one contribution
- Gifts to organizations that support schools where the organization is neither a school nor a foundation supporting a school
- Gifts made by or through community trusts or similar organizations, including charitable remainder trusts, donor-advised funds, or family foundations
- Payments for which goods or services were received, such as purchases at a school fundraiser auction or tickets to an event

Educational Matching Gift Program Request



Part 1 — For Team Member

Instructions for team member: Complete Part 1 of this form. Complete one form for each gift. Please print or type. Send this form and a copy of the program guidelines to the recipient organization.

Team Member Name		
Team Member Employee ID		
Address		
City	State	ZIP Code
Work Phone (including area code)	Email Address	
Exact Date of Gift	Amount of Gift (min \$25)	Amount to Be Matched (min \$25)
I made my donation by (please check one):		
<input type="checkbox"/> Check or Credit Card <input type="checkbox"/> Stock or Securities		
If stock or securities, list the number of shares and the name of the stock or securities:		

Name of Accredited Educational Institution	City and State
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I hereby certify that:

- Neither my family nor I will derive any direct or indirect financial or material benefit from this contribution.
- I authorize the above-named school to report this gift to Wells Fargo for the purpose of applying for a matching gift.
- My gift is a voluntary contribution, that it fully complies with the provisions of the program described herein, and that it does not represent in any way a fee for a service or benefit.
- I have not been nor will I be reimbursed or compensated by anyone for this contribution.
- I have read and understand the guidelines of the Wells Fargo Educational Matching Gift Program.
- Any misrepresentation by me of the statements made herein will forfeit my rights to any matching contributions.
- By signing this document, I understand that any misrepresentation of information violates Wells Fargo's Code of Ethics and Business Conduct.

Signature (required)	Date
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Part 2 — For Recipient Organization

Instructions for recipient organization: Verify receipt of gift. Complete Part 2 of this form. Please print or type. If this is your first matching gift request to the Wells Fargo Educational Matching Gift Program, please forward a brief description of your organization's primary mission statement or purpose. Forward the form and attachment(s) to the address below.

Employer Identification Number (EIN)	Name of Accredited Educational Institution	
Mailing Address		
City	State	ZIP Code
Telephone (including area code)	Fax (including area code)	
Email Address	Website Address	
Date Gift Received	Amount of Gift	Tax Deductible Gift Amount

I hereby certify that:

- This accredited education institution meets the eligibility requirements of the Wells Fargo Educational Matching Gift Program.
- Neither the donor nor Wells Fargo will derive any personal material benefit from this gift or match.
- This institution is in full compliance with the antiterrorism laws legislated by the USA PATRIOT Act. In addition, by countersigning the matching gift application, I agree that this institution will not promote or engage in violence, terrorism, bigotry, or the destruction of any state, nor will it make subgrants to any entity that engages in these activities.
- I am authorized to attest to the above statements and have sufficient knowledge to do so.
- I have read and understand the guidelines of the Wells Fargo Educational Matching Gift Program.

Authorized School Personnel Name	
Title	Date
Signature of Authorized School Personnel	

***Completed forms should be received within six (6) months of gift date. Failure to complete this form will delay processing.**

MAIL COMPLETED FORM AND REQUIRED ENCLOSURES TO:

**Wells Fargo Educational Matching Gift Program
JK Group, Inc., P.O. Box 2157, Princeton, NJ 08543-2157
Phone: 1-888-518-4438**