



# Fidelity Foundation Matching Gifts to Education Form

## Part I: To be filled out by Fidelity Employee

## Part II: To be filled out by Educational Institution

### Employee Instructions:

- Complete and sign parts A, B & C below—one form for each gift.
- Send this form with your contribution to the recipient organization.
- Note: Gifts will not be matched if this form is submitted more than 12 months after the date of the gift.
- Review the *Program Guidelines* and note that organizations which are described as public charities under Section 509(a)(3) of the Internal Revenue Code ("supporting organizations") are not eligible for Matching Gift consideration.

### Recipient Organization Instructions:

- Complete all fields, sign, and return to the address below.
- **Required:** Attach a copy of the donor's check, credit card receipt, or security gift details. *Note: A copy of the receipt sent to the employee is not an acceptable proof of payment.*
- If you have not received a gift from Fidelity Investments in the past year, please attach copies of:
  - Your **IRS Letter of Determination** certifying tax-exempt status, or (if parochial school) diocese directory listing

### A. Employee Information

First Name		
Last Name		
Employee Badge ID Number <b>REQUIRED</b>	Phone Number	
<b>A</b>		
Home Address		
City	State/Province	ZIP/Postal Code

### B. Gift Information

Name of Educational Institution	
Amount of Gift <i>\$50 minimum</i>	Date of Gift <i>MM DD YYYY</i>
\$	

### C. Signature

By signing below, you:

- Attest that the information presented above is accurate and verify that you have read and understood the policies of the Fidelity Foundation Matching Gifts to Education program.
- Attest that this contribution was funded solely by you (or by your spouse from a joint account) and did not consist of funds contributed directly or indirectly by any other person.
- Attest that no goods or services were provided in exchange for any part of your gift.

Employee Signature <b>REQUIRED</b>	Date <i>MM DD YYYY</i>
<b>SIGN</b>	

### A. Educational Institution Information

Name of Educational Institution		
Federal Tax ID Number	Name of Accrediting Organization	
Address		
Address		
City	State/Province	ZIP/Postal Code
Phone Number	Extension	
Email Address		

### B. Gift Information

Tax-Deductible Amount of Gift <i>\$50 minimum</i>	Date Gift Received <i>MM DD YYYY</i>
\$	

### C. Signature

By signing below, you:

- Attest that the information presented above is accurate.
  - Attest that no goods or services were provided in exchange for any part of the gift.
- I have enclosed the **IRS Letter of Determination**, and confirmation of the employee's donation. *If applicable. See instructions above.*

Name and Title <i>Please Print</i>	
Officer of Institution Signature <b>REQUIRED</b>	Date <i>MM DD YYYY</i>
<b>SIGN</b>	

**NOTE: Forms sent without the required information or documentation will NOT be processed.** (485210.3.0)

Mail completed form and required attachments to:  
Fidelity Foundation Matching Gifts to Education Program  
P.O. Box 770001  
Cincinnati, OH 45277-0052

OR  
Fax to:  
1-877-665-4274