

Goldman, Sachs & Co.  
P.O. Box 3527  
Princeton, NJ 08543-3527  
Toll Free: (877) 298-2635  
Fax: (609) 799-8019  
Email: gs@easymatch.com

# Educational Matching Gift Application

**Part A to be completed by employee.**  
**Part B to be completed by educational institution.**

## Part A – Employee

**Please complete Part A and mail this application with your contribution DIRECTLY TO THE EDUCATIONAL INSTITUTION.**

Employee ID# \_\_\_\_\_ Employee name \_\_\_\_\_

Employee home address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email address: \_\_\_\_\_

Amount of Gift \_\_\_\_\_ Amount to be matched \_\_\_\_\_ Date of gift \_\_\_\_\_

If Securities: Name of Securities \_\_\_\_\_ Number of Shares \_\_\_\_\_

Name of Educational Institution \_\_\_\_\_

City/State \_\_\_\_\_ Program Designation (if any) \_\_\_\_\_

Certification – I certify that my gift is a voluntary charitable contribution. I verify that these are my own resources and not the gifts or loans of any other person or organization. My gift does not, in any way, represent tuition or an offset against tuition, and this gift is not made in return for or expectation of any monetary or other benefit for me, or for any person or organization named by me. In addition, my gift will not be used for religious or political purposes, or to fulfill a religious or political commitment.

Employee's signature \_\_\_\_\_ Date \_\_\_\_\_

## Part B – Educational Institution

**Please complete Part B and return to the address at top of form.**

Verification – I verify receipt of the gift described above in the amount of or value of \$ \_\_\_\_\_

and certify that this institution/organization is a nonprofit public charity, and that contributions to it are tax deductible under Sections 501 (c) (3) and 170 (b) of the Internal Revenue Code of the United States. Moreover, this institution/organization is not a private foundation as defined in Section 509 (a) of the Internal Revenue Code, nor does it discriminate on the basis of race, sex,

color, or creed. Furthermore, I certify that this gift is a voluntary charitable contribution of the personal resources of an employee or director of Goldman, Sachs & Co. and does not represent in any way tuition or payment in exchange for or in expectation of monetary or other benefits to be given to the donor or any person or organization affiliated with the donor. In addition, this gift will not be used for religious or political purposes, or to fulfill a religious or political commitment.

Certifying Officer's signature \_\_\_\_\_ Tax exempt ID# \_\_\_\_\_

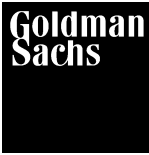
Certifying officer's name (print) \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

Name of educational institution \_\_\_\_\_

Address of educational institution \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email address \_\_\_\_\_ Web site address \_\_\_\_\_



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# Educational Matching Gift Guidelines

## Eligible Donors

- Permanent employees with the Firm for at least one year and eligible for full benefits.
- Members of the Firm's Board of Directors.

## Matching

The Firm will match gifts dollar-for-dollar from a minimum of \$25 to a maximum of \$2000 per eligible individual, per calendar year. The gifts may be made in the form of cash or securities. Contributions can be made to more than one eligible institution.

## Educational Institution Qualifications

To be eligible, all institutions must be recognized by the United States Treasury Department as tax exempt under Section 501 (c) (3) of the Internal Revenue Code (the "Code").

Contributions can be made to schools in the United States and Canada provided the schools are recognized by the United States Treasury Department as non-profit, non-proprietary educational institutions, contributions to which are deductible by the donor for federal income tax purposes.

Contributions can be made to schools not located in the United States or Canada provided the schools have received a ruling or determination letter from the United States Internal Revenue Service that it is an organization described in Section 501 (c) (3) and 50 (a) (1) of the Code. If this letter is not available, an affidavit or opinion of counsel must be provided setting forth sufficient facts concerning the operations and support of the institution for the IRS to determine that the institution would be likely to qualify as an organization as described in Sections 501 (c) (3) and 509 (a) (1) of the Code. The determination letter, the affidavit or opinion must accompany the Educational Matching Gift Application.

## Eligible Institutions:

- Accredited post-secondary institutions listed in the Higher Education Directory.
- Accredited secondary schools listed in the Porter Sargent Handbook of Private Schools.
- State licensed public, private and parochial primary and secondary schools.
- The United Negro College Fund, or independent colleges, or similarly recognized organizations.

## Institutions that are not eligible:

- Pre-school
- Childcare

## Program Administration

The administrators of the Goldman Sachs Educational Matching Gift Program reserve the right to make the final determination regarding the eligibility of both donors and recipient institutions. The administrators further reserve the right to discontinue or amend any part of the Program without prior notice.

Payments are made on a quarterly basis, on or about the 15th of January, April, July, and October, for applications received by the last business day of the previous month. You should allow time for processing by submitting your gift well in advance of the disbursement periods.

Applications received after the dates indicated above will be processed in the next quarter. For example, an application received on January 1 will be paid in April.

Allow an additional three months for processing applications received from organizations outside the United States and Canada.

## Application Procedure

To apply for matching funds, please complete Part A of the application and mail it with your contribution to the eligible institution.

An authorized officer at the institution should then complete Part B and send it to:

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## For Additional Information

If you have questions or need additional matching gift applications, you may call or write:

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