



# Xerox Employee Matching Gifts Program

## To All Employees

Xerox believes that the healthiest and most efficient solutions to social problems are pluralistic in nature-- those receiving support from business, government, foundations and individuals. This broad-based support ensures that non-profit institutions are not beholden to the interests of any one group.

In an effort to encourage Xerox people to support non-profit institutions of their own choice, Xerox provides several opportunities for employee participation. One such opportunity is the Xerox Employee Matching Gifts Program.

Your contributions to qualified four-year educational institutions, two-year community colleges and junior colleges are matched by Xerox according to the guidelines described in this document. We hope you will read it and consider the Matching Gift program when you make your charitable decisions.

## General Provisions of the Programs

Xerox will match employee gifts, ranging from a minimum of \$25 to a maximum of \$1000 per institution each calendar year on a one-to-one basis. The contribution must be to qualified four-year educational institutions or a two-year community or junior college.

Xerox will match up to the maximum limit of \$1000 for as many institutions as the employee wishes to assist. To be eligible, under the terms of this program, an organization must be tax-exempt as defined by the Internal Revenue Service of the United States Treasury Department.

## Contribution

- a. A gift must be an actual contribution made, not a pledge, and can be cash or securities at market value on the date of transfer.
- b. If securities are given, the value will be determined to be the last sale or published bid price on the date of the gift.

## Employee

- a. At the time of the contribution, the individual must be a qualified employee, which means a current employee, or director of Xerox Corporation.
- b. For contributions to educational institutions, the qualified employee need not have attended the school designated.
- c. Xerox will not match gifts of retirees or spouses of employees.

## Educational Institutions Eligible

- a. The institution must offer a four-year or a two-year degree, and be located in the United States or in a U.S. possession. Such institutions would normally include universities, colleges, graduate schools and technical institutes which are accredited or approved by a nationally recognized accrediting agency.
- b. Alumni funds, foundations or associations are also eligible, provided they are properly certified by the institution with which they are affiliated and are recognized by the Internal Revenue Service as organizations to which contributions are deductible for Federal Income Tax purposes. National, regional, state and intercollegiate associations whose primary goal is financial support of higher education (e.g., New England College Fund, Independent Colleges of Southern California, etc.) are also eligible.

## Gifts Not Qualified For Matching

Xerox will not match:

- Gifts to public or private elementary and secondary schools.
- Gifts to educational institutions that are not fully accredited.
- Gifts to other non-profits, such as medical research organizations.

- Payments for tuition, books or other student fees.
- Dues payable to national or local alumni groups.
- Subscription fees for publications.
- Bequests.
- Restricted gifts such as family scholarship funds and athletic subsidies.
- Libraries and museums affiliated with colleges and universities.
- Dues or contributions to sororities or fraternities.

## How the Program Operates

1. The employee should complete and sign Part A.
2. The form along with the contribution should be mailed to the designated institution.
3. An authorized official of the organization should complete and sign Part B thereby certifying the receipt and intent of the gift in accordance with the conditions of the program. The form should be returned to:  
Xerox  
Attn: Matching Gifts  
201 Merritt 7  
Norwalk, Connecticut 06851-1056
4. Xerox will match eligible requests for matching gifts periodically during each calendar year. Payments will be made to the institution on an unrestricted basis.
5. The interpretation, application and administration of the provisions of the matching gifts program shall be determined by Xerox and its decision shall be final.
6. Questions regarding the program should be directed to: Delores Kennerly (Delores.Kennerly@xerox.com) and/or Elissa Nesbitt (Elissa.Nesbitt@xerox.com.)
7. Matching Gifts forms can be obtained through the Forms Management internal website in Rochester, The Hub intranet site or from your Human Resources office.

## Part A - Employee

Fill out this part and mail the form along with your contribution to the named organization.

Enclosed is my personal gift of \$ \_\_\_\_\_ Date \_\_\_\_\_

If securities, etc. include value \_\_\_\_\_

Name of organization \_\_\_\_\_

**I hereby authorize the above named organization to verify this gift and report it to The Xerox Foundation, Norwalk, Connecticut, for the purpose of qualifying for a contribution under its Matching Gifts Program. I am currently employed by Xerox Corporation or a Xerox Company.**

Full name of employee \_\_\_\_\_

Employee # \_\_\_\_\_

Department and/or Subsidiary \_\_\_\_\_

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

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

## Part B - To Be Filled Out by the Organization

Fill out this part of the form and mail to: **Xerox  
Attn: Matching Gifts  
201 Merritt 7  
Norwalk, CT 06851-1056**

**I hereby verify receipt of the above-stated gift:**

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

Contact Name \_\_\_\_\_

Title \_\_\_\_\_

Address \_\_\_\_\_

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

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

This document must be accurate and complete. Please print or type. Do not submit electronically.