

## GE Foundation Matching Gifts Program

### **GENERAL**

#### *1. What are the 2 components of the GE Foundation Matching Gifts Program?*

Community Matching Gifts: The GE Foundation matches dollar-for-dollar contributions made by GE employees and retirees to approved social service, arts, environmental and other community-based organizations through the Community component (formerly known as “More Gifts...More Givers”) of its Matching Gifts Program.

Higher Education Matching Gifts: The GE Foundation matches dollar-for-dollar contributions made by GE employees and retirees to eligible colleges and universities through the Higher Education component (formerly known as the “Corporate Alumni Program”) of its Matching Gifts Program.

#### *2. How much can I give?*

In order to be matched, a gift must be a minimum of \$25 (USD). Gifts by an individual employee/retiree will be matched up to \$50,000 (USD) in a calendar year for the combined Higher Education and Community components of the GE Foundation Matching Gifts Program.

#### *3. What types of gifts will be matched?*

- Gifts must be made payable directly to the eligible organization or institution.
- Gifts must be personal contributions from the donor's own assets. Gifts must be made, not merely pledged, in cash, securities, or real estate.
  - Matching of real estate gifts will not exceed fifty percent of appraised value. It is the responsibility of the donor and/or donee to furnish an independent appraisal of real estate contributions satisfactory to the GE Foundation (see address below).
- Gifts may be made by current payment from an irrevocable trust, private or family foundation or donor advised fund, if that trust, foundation or fund has been funded solely by an eligible participant.
- Gifts may also be made through a contribution to an entity, such as a charitable remainder trust, created and funded solely by an eligible participant specifically to benefit an eligible charitable organization/institution. The GE Foundation will match the donor's current year's deduction value (based on the present value of the payment or payments to be made to the charitable organization/institution). Note that the donor will need to provide the GE Foundation with a copy of the executed agreement as well as the current actuarial calculation showing the amount of the charitable deduction. Please send documentation to:

Kathleen Mayglothling  
3135 Easton Turnpike

Fairfield, CT 06828  
Or fax to 203-373-3029

4. *Who is eligible to participate?*

- i. Employees of the GE Company or a majority-owned affiliate on the date of the gift.
- ii. Persons who have retired directly from the GE Company or a majority-owned affiliate.
- iii. A surviving spouse of an eligible retiree (as defined in item 2 above).
- iv. Directors and Directors emeriti of GE Company.

If you feel you fit the above criteria but have been told you are not eligible to participate, please send an email to [matchinggifts@ge.com](mailto:matchinggifts@ge.com). The GE Foundation staff will work to resolve your issue.

5. *How do I register a gift to be matched?*

- At or after the time of the donation, the GE employee or retiree should register the gift on the GE Foundation Matching Gifts website (accessible through <http://www.gefoundation.com> by clicking on "Matching Gifts").
- The donor will need to log in using his or her SSO I.D. and password and provide the following information: organization, gift amount, gift type and gift date.
- After saving the gift, the donor will have the option of printing a confirmation of registration. If registering the gift by phone, the GE Foundation Matching Gifts Center can mail a confirmation to the donor.
- Upon receipt of the gift, the recipient organization or institution must access the website to verify receipt of the gift.
- Gifts made within the calendar year must be registered by the donor and confirmed by the recipient organization or institution by the following January 31 in order to be matched in May of the following year. All matching gift checks will be issued at that time.
- Paper forms are not accepted. Eligible participants without Internet access may register their gifts by phone with the Customer Service Center, Monday through Friday, from 8 am to 8 pm (Eastern) at 800-305-0669.

6. *Can I give to any nonprofit as part of Community Matching Gifts?*

Organizations must be nominated by an eligible GE employee/retiree, reviewed and endorsed by a GE Lead Communicator or Community Affairs Leader (where they exist), and subsequently approved in advance by the GE Foundation. Please see the GE Foundation Matching Gifts website for further information on the nomination process (accessible through [www.gefoundation.com](http://www.gefoundation.com)).

7. *Can I give to any college or university as part of Higher Education Matching Gifts?*

The eligible participant or his/her spouse, child or parent must have at least one of the following relationships with the beneficiary institution:

- Is a recognized alumnus/alumna, or
- Serves or has served as a faculty member, as a Trustee, or on the Governing Board, or
- Is a current student, or
- Holds an honorary degree.

Notes:

- Only gifts made by the eligible participant (employee/retiree) will be matched and not gifts made by his/her extended family.
- A surviving spouse of an eligible employee or retiree is eligible to have his/her gift matched (if such spouse was legally married to the decedent at time of death) if the gift is made to an institution that meets all program requirements and at which the decedent (a) was an alumnus/alumna, (b) held an honorary degree, (c) served or was serving as a trustee or on the Governing Board of the institution, or (d) was a student at time of death.

8. *How do I log in to the GE Foundation Matching Gifts website?*

GE Employees and Retirees must log in using their SSO I.D. and password.

9. *What is SSO and how do I register for an account?*

GE Single Sign On (SSO) is a Company-wide security and navigation feature designed to allow users to securely sign on and move between GE's web sites. From the log in page you have the option of registering for an account if you do not currently have one. NOTE TO RETIREES: the easiest way for retirees to register for an SSO account is to do so from the Benefits homepage (<https://benefits.ge.com>).

10. *I have an SSO I.D. Why can't I participate?*

Not everyone who has an SSO I.D. is eligible for the program (please see eligibility criteria above or in program guidelines on [www.gefoundation.com](http://www.gefoundation.com)).

If you are a new employee, it may be that your information has not been added to the eligible population (the donor feed occurs once a month).

If you are a recent retiree, please note that there is a processing lag that may occur before you are recognized as eligible for Matching Gifts as a retiree.

Also, at the current time GE's non-U.S. employees and retirees are not able to participate due to privacy restrictions. GE is in the process of pursuing approval for this and other programs and systems worldwide.

*11. I am at the SSO login page and I'm getting an error. Who do I contact about this?*

Please contact your local business-unit Help Desk or End User Computing where appropriate if you are having issues logging in or registering for the first time.

Users not actively employed at GE should send an email to [webmcbd@corporate.ge.com](mailto:webmcbd@corporate.ge.com).

*12. I cannot locate my organization in the search engine.*

It is possible that the donor is entering too much information into the search engine. The most accurate way to search for a particular organization is to enter only the organization's Federal Tax ID number in the search criteria field.

If the donor does not have this information, they may enter a keyword for the organization's legal name and state where the organization is located (entering the city will further narrow the search).

If the organization is not in our database, the organization is most likely not listed on the electronic database of the IRS tax-exempt 501(c)(3) organizations, the Higher Education Directory (colleges and universities), or the National Center for Education Statistics (public school districts).

The employee can click on the link: "Can't find your organization? Click here to submit it for consideration" to initiate the nomination process to have the organization considered for eligibility.

*13. How do I nominate an organization for inclusion in the Matching Gifts Program?*

A participant can initiate the nomination process by clicking on the link "submit it for consideration." Organizations must be nominated and approved in order to be included in the Community Matching Gifts Program. In addition, they must continue to meet certain criteria to remain eligible (e.g. receiving a total of at least \$1,000 in each calendar year from a minimum of ten eligible GE employees or retirees).

## **NONPROFIT ELIGIBILITY**

*1. How do I know if my favorite organization has a 501(c)(3) status?*

The Internal Revenue Service has an electronic database of eligible 501(c)(3) non-profit organizations, called the Electronic Master Business File, which is updated each calendar quarter. The GE Foundation uses the IRS electronic database to determine an organizations 501(c)(3) status.

Upon logging into the GE Foundation Matching Gifts website, you may input the organization information into the search engine. If you get a return, the organization is eligible. The employee may also contact their organization prior to making a donation and ask them for their Federal Tax ID number. Searching using only the Federal Tax ID number of the organization will provide the most accurate response.

2. *What if my organization is not qualified as a 501(c)(3)?*

The GE Foundation cannot make donations to organizations in the United States that are not qualified as a 501(c)(3) public charity.

3. *Can I donate to my church? High school? Etc?*

Participants should refer to the Community Matching Gifts Program Guidelines for eligibility criteria. The guidelines can be found on the GE Foundation website.

4. *We are a 501(c)(3) nonprofit organization in receipt of a GE employee's donation, but the employee can't find our organization the system.*

The organization should provide their Federal Tax ID number to the GE employee or retiree so that they may enter it into the search engine and search for the organization.

If the organization still does not appear in our database, it means that the organization is not currently listed on the IRS electronic database. The organization may call the IRS Call Center at (877) 829-5500 and request that they be added to and included on the next update of the electronic database. When the organization is listed on the IRS electronic database of tax-exempt organizations, they can be nominated for inclusion in the GE Foundation Matching Gifts Program.

5. *What if an approved organization doesn't meet the "10 donor/\$1,000 rule"?*

Upon approval, organizations must receive a total of at least \$1,000 in each calendar year from a minimum of ten eligible GE employees or retirees. Approved organizations not meeting this in a given year will receive a warning. If they do not meet the criteria 2 years in a row, they will be removed from the list of eligible participants. At that point, an organization would have to be nominated again in order to be reinstated.

6. *I have been a donor for to the same nonprofit for years and now I am getting a message that the organization is not a verifiable tax exempt 501(c)(3). How is that possible?*

Occasionally, an organization may temporarily lose their 501(c)(3) eligibility due to a penalty, an oversight, or an error on the IRS electronic database. This is usually temporary. The nonprofit should contact the IRS Call Center to resolve the situation.

### ***FEDERAL TAX ID VERIFICATION***

#### *For NPO's using a Parent Tax ID*

If the organization is using the Federal Tax ID of a parent organization, we will need them to obtain a letter from the parent organization (on letterhead) that gives permission for that organization to use the parent organization's Tax ID for the GE Foundation Matching Gifts Program. This letter will need to include the name, address, and Federal Tax ID of the parent organization and the name and address of the organization authorized to use the number.

#### *For Public School Districts*

A public school district can provide their district NCES ID number rather than a Federal Tax ID for verification purposes.

#### *For All Other NPO's*

If the Federal Tax ID is unable to be verified electronically and does not fall into one of the categories above, they should be referred to the Internal Revenue Call Center (877) 829-5500 to get a clarification of their tax status. If they do have 501(c)(3) status, but will not be listed on the Master Business File (usually for financial reasons), they will need to obtain a letter from the IRS stating that the status of the organization.