

Educational Gift Matching Form

Alcoa Foundation

	DONOR FILLS IN THIS SECTION	OUR ADDRESS
<p>PLEASE TYPE OR PRINT IN INK.</p> <p>1 Fill in this section.</p> <p>2 Assure form is completed and signed.</p> <p>3 Send form with your gift to the institution.</p> <p>The donor's signature authorizes the recipient institution to report this gift to Alcoa Foundation to apply for a Matching Gift.</p> <p>The countersignature by the authorized officer of the institution confirms receipt of the described gift.</p>	<p>Name of Donor _____</p> <p>Home Address _____ <input type="checkbox"/> Check if new address</p> <p>City/State _____ Zip Code _____</p> <div style="border: 1px solid black; padding: 5px;"> <p>I certify that this gift is solely for the use of the institution named and that neither I, nor any member of my family, nor any related third party, will benefit in any way from this gift. I further certify that the amount given is entirely my own.</p> <p>In addition, I certify that I am:</p> <p><input type="checkbox"/> An active, full-time, U.S.-based employee of Alcoa Inc. or one of its wholly-owned subsidiaries OR</p> <p><input type="checkbox"/> A retiree receiving an Alcoa Inc. pension (other than a deferred-vested pension) OR</p> <p><input type="checkbox"/> A member of the Board of Directors of Alcoa Inc.</p> <p><input checked="" type="checkbox"/> _____</p> <p style="text-align: center;">Signature of Donor Date</p> </div> <p>Name of Institution Receiving Gift _____</p> <p>Institution Address _____</p> <p>City/State _____ Zip Code _____</p> <p>_____</p> <p style="text-align: center;">Social Security Number</p> <p>() _____</p> <p style="text-align: center;">Daytime Telephone Number</p> <p>_____</p> <p style="text-align: center;">Work Location</p> <p>_____</p> <p style="text-align: center;">City, State</p> <p>____/____/____</p> <p style="text-align: center;">month day year</p> <p style="text-align: center;">Date of gift</p> <p style="text-align: center;">\$ _____,_____.00</p> <p style="text-align: center;">Amount of Gift (minimum \$100)</p> <p><input type="checkbox"/> Cash/Check <input type="checkbox"/> Credit Card</p> <p><input type="checkbox"/> Securities _____ Shares of _____</p> <p style="text-align: center;">Name of Securities</p>	<p style="text-align: center;">RETURN TO:</p> <p>Matching Gift Center 850 NW Federal Hwy Stuart, FL 34994</p> <p>Telephone: (772) 403-2014</p> <div style="border: 1px solid black; padding: 5px; text-align: center; color: red;"> <p>Gifts may also be registered on-line at www.givingprograms.com/alcoa.</p> </div> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <p>CHECKLIST</p> <p><input checked="" type="checkbox"/> Form is signed?</p> <p><input checked="" type="checkbox"/> Gift is \$100 or more?</p> <p><input checked="" type="checkbox"/> Gift date entered?</p> <p><input checked="" type="checkbox"/> Institution name entered?</p> <p><input checked="" type="checkbox"/> Clearly printed?</p> <p><input checked="" type="checkbox"/> Have guidelines listed below been reviewed?</p> </div>

	RECIPIENT INSTITUTION FILLS IN THIS SECTION	FIRST REQUEST
<p>1 Verify Donor section.</p> <p>2 Complete this section.</p> <p>3 Return form to address shown at top right.</p> <p>4 If first request, see box at right.</p>	<p>Name of Officer Authorized to Sign this Form _____</p> <div style="border: 1px solid black; padding: 5px;"> <p>I confirm the above gift was received and this institution is tax exempt under the U.S. Internal Revenue Code. I further confirm that no direct, tangible benefit will accrue to the donor, to any member of their family, nor to any related third party as a result of this gift.</p> <p><input checked="" type="checkbox"/> _____</p> <p style="text-align: center;">Signature of Authorized Officer/Principal Date (stamp signature can not be accepted)</p> </div> <p>_____</p> <p style="text-align: center;">Title</p> <p>() _____</p> <p style="text-align: center;">Institution Telephone Number</p> <p style="text-align: center;">\$ _____,_____.00</p> <p style="text-align: center;">Amount of Donor's Gift</p> <p style="text-align: center;">\$ _____,_____.00</p> <p style="text-align: center;">Tax Deductible Portion of Gift</p>	<p>If an institution has not previously participated in the Alcoa Foundation Gift Matching program, include the following:</p> <ul style="list-style-type: none"> Copy of its 501(c)(3) from the IRS. Documentation of accreditation. Information describing the nature of the institution.

ELIGIBLE GIFTS

Alcoa Foundation will match charitable contributions from a **minimum of \$100 per gift**, up to a **maximum total per donor of \$2,500 in a calendar year**.

All gift matching forms must be received at the Alcoa Foundation processing center within one year of the date of the gift. A personal gift must be paid (not merely pledged) to an eligible school, and may be in the form of a check or marketable securities. Outright gifts of securities will be valued at the **closing** market price on the date of the gift. No other types of gifts will be matched.

INELIGIBLE GIFTS

- Tuition payments or gifts that reduce tuition.
- Gifts that benefit specific individuals, such as scholarship or financial aid.
- Payments for tickets, books, student fees, alumni dues, magazine subscriptions, insurance premiums or other payments which are not direct gifts to an eligible school.
- Gifts made with funds provided to the donor for donation purposes by other persons.
- Gifts made to separately incorporated fund-raising entities such as athletic funds, booster clubs, fraternities and sororities.
- Gifts made by surviving spouses of employees, retirees or directors.
- Value of personal services.

RESTRICTIONS

The matching gift from Alcoa Foundation:

- May not lead to the donor's receiving **any** benefits with a monetary value (such as tickets to athletic or social events).
- May not be used to reduce a church-related financial commitment (such as a tithe or assessment).

Alcoa Foundation

Educational Gift Matching Program

*Make a contribution to the college or university of your choice,
and Alcoa Foundation will contribute the same amount.*

THE PROGRAM

The Educational Gift Matching Program is a part of Alcoa Foundation's continuing support for the men and women and the institutions which will provide tomorrow's leadership. The program's principal objective is to provide incentive for Alcoa employees and retirees to make regular contributions to educational institutions of their choice. Under the program, Alcoa Foundation will match an eligible gift to an eligible school. For example, if a donor makes a \$100 gift to a school, the Foundation will make a \$100 gift to the same school. The minimum gift eligible for matching is \$100, and the annual maximum per donor eligible for matching is \$2,500.

HOW IT WORKS

*The donor must fill out the **Top Portion** of this form and send it with the gift to the school. A separate form must accompany each gift. An authorized Financial Officer of the recipient school must complete the **Bottom Portion** and mail the entire form to our processing center so that it is received **within one year** of the date of the gift. Alcoa Foundation may request additional information about the gift from the donor and recipient school. Alcoa Foundation will notify the donor when their matching gift request has been approved. Alcoa Foundation matches gifts quarterly by sending a check directly to the school. The gifts of Alcoa Foundation must be used to advance the educational objectives of the recipient school; beyond that, gifts of Alcoa Foundation are unrestricted.*

Gifts may also be registered on-line at www.givingprograms.com/alcoa.

The Directors of Alcoa Foundation may revise, suspend or terminate the program at any time. The interpretation and administration of the program will be determined by the Directors of Alcoa Foundation, and their decision will be final.

ELIGIBLE DONORS

- *Active, full-time, U.S.-based employees of Alcoa Inc. or its wholly-owned subsidiaries.*
- *Retirees receiving an Alcoa Inc. pension (other than a deferred-vested pension).*
- *Directors of Alcoa Inc.*

ELIGIBLE INSTITUTIONS

- *Degree-granting colleges, universities and junior colleges qualify if they are fully accredited by a recognized regional or professional accrediting agency and are recognized as tax-exempt by the Internal Revenue Service.*
- *Alumni funds or foundations that exist for charitable purposes may qualify if they are an integral part of an eligible school.*
- *Separately incorporated fund-raising entities - such as athletic funds, booster clubs, sororities and fraternities - **do not** qualify.*