



# The Boeing Company Charitable Trust Gift Matching Program



## ELIGIBLE DONORS

- Employees of The Boeing Company or wholly owned subsidiaries and their spouses or domestic partners
- Directors of The Boeing Company and their spouses or domestic partners
- Retired employees under The Boeing Company Employee Retirement Plan and their spouses or domestic partners

## MATCHING

- Gifts are matched dollar-for-dollar, except for gifts by retirees, which are matched \$ .50 to the dollar.
- Minimum gift is \$25. Matching is on whole dollars only.
- The maximum donation matched per employee household, per calendar year, is \$6,000. (If both husband and wife are Boeing employees maximum is \$12,000 per household per year). The maximum match of \$6,000 is based on total contributions per program year based on the date of gift (not date that the gift is processed.)
- Gifts are matched only if (or to the extent) they are tax-deductible to the donor. The non-deductible portion will not be matched.
- Boeing reserves the right to decline to match any donation to an organization (a) that denigrates or advocates discrimination or violence toward any racial, ethnic or cultural group or (b) whose practices are in the good faith determination of the company, otherwise inconsistent with company goals and policies.
- The donation must be personal gift, paid (not merely pledged) by check or in securities having a quoted market value. Securities will be matched on the basis of the closing price on the date of the gift.

## ADMINISTRATION

**Note:** Effective May 8, 2009 all gifts will be made from the Boeing Company Charitable Trust

- The Boeing Company Charitable Trust issues checks four times per year (April, July, October, and January) to match eligible gifts for which the forms were received. Forms received after the end of any given quarter will be processed in the following quarter.
- The Boeing Company Charitable Trust reserves the right to suspend, limit, change, revoke or terminate this program at any time.
- All determinations concerning program eligibility criteria, or participation are solely within the discretion of the Boeing Company Charitable Trust.
- Forms must be processed within 1 year of the date of the gift. After 1 year the gift is no longer eligible for matching.
- For more information, please use one of the following:  
**Phone:** toll free 1-888-531-GIFT (4438)  
**Email:** boeing@easymatch.com

## ELIGIBLE ORGANIZATIONS: EXAMPLES

### Higher Education Institutions

- Non-profit private and public degree-granting graduate and professional schools, universities, 4-year and 2-year colleges in the United States and Canada that are listed in *The Higher Education Directory of Colleges and Universities* published by the U.S. Office of Education.
- Tax-exempt educational funds (e.g. The United Negro College Fund and Independent College Funds of America), whose sole purpose is raising money for individually eligible constituent member colleges.

### Kindergarten – 12<sup>th</sup> Grade (K-12) Schools

- Public schools accredited or recognized by the appropriate governmental educational entity within the state.
- Private schools accredited or recognized by an appropriate academic accrediting organization.
- Parent Teacher Associations (PTA) recognized by the Internal Revenue Service as tax exempt under section 501(c)(3) of the Internal Revenue Code.
- A tax-exempt school district foundation whose sole purpose is raising money for their individually eligible constituent member schools.

### Arts & Cultural Organizations

- Performing arts companies in dance, drama, opera and music
- Arts and cultural centers
- Science Centers
- Public Libraries
- Museums
- Zoos, aquariums and botanical gardens
- Land trusts and "Friend of the Park" organizations that support local, state or national parks or sanctuaries
- Public radio and public television stations
- Historical societies

## NON-ELIGIBLE ORGANIZATIONS (Including, but not limited to)

- Athletic teams, booster clubs, or support organizations
- Bequests, memorials
- Religious or political organizations
- Fraternities, sororities and alumni groups
- Fraternal or veterans organizations
- Hospital, medical research organizations
- Individuals
- Ministries, theological or bible schools
- Tithes or tuition
- Professional associations, federal campaigns (including United Way)
- School choirs, bands or drill teams
- Subscriptions, dues, insurance premiums or student fees
- Travel, gifts-in-kind (e.g. real estate, personal property other than securities or personal services)
- Membership or subscription portion of a donation (e.g. you donate \$100 to a zoo, however, in return you receive a family membership valued at \$45. The match portion of your donation would be \$55.)

**Note:** If this gift is being made by or through a community trust or similar organization, including charitable remainder trusts, donor advised funds or family foundations it can only be matched at the time of disbursement to the eligible not-for-profit.

## GIFT MATCHING PROCEDURE

**DONOR:** Complete Part A only and mail entire form together with your contribution to the receiving organization (name in Part B on the front of this form)

**INSTITUTION RECEIVING GIFT:** Complete Part B and return form to:

**The Boeing Company Charitable Trust Gift Matching Program**  
P.O. Box 3723  
Princeton, NJ 08543-3723

**FIRST TIME MATCH:** If your institution has not previously received funds matched by The Boeing Company Charitable Trust, please review eligibility guideline and include the following documentation *only* with your *first* request for gift matching:

- For Cultural and Arts Organizations, PTAs, School Foundations, and Education Fund Organization.
- Copy of Internal Revenue Service (IRS) 501 (c) (3).
- Published information about the organization (for example, brochures or mission statements).
- For Kindergarten-12<sup>th</sup> Grade Schools and Higher Education Institutions.
- Copy of appropriate accreditation certification or state certification.



# The Boeing Company Charitable Trust Gift Matching Program



## GIFT MATCHING FORM

### PART A *(to be completed by donor)*

Complete part A (only) and forward this form along with your donation to the Receiving Organization. **All requested information must be provided. If a photocopied form is used, please copy both sides. Please print legibly**

- Donor Status: (mark one)**
- |   |  |
|---|--|
| <input type="checkbox"/> Boeing Employee                  | <input type="checkbox"/> Spouse or Same-Sex Domestic Partner of Boeing Employee                  |
| <input type="checkbox"/> Wholly-Owned Subsidiary Employee | <input type="checkbox"/> Spouse or Same-Sex Domestic Partner of Wholly-Owned Subsidiary Employee |
| <input type="checkbox"/> Boeing Board of Directors Member | <input type="checkbox"/> Spouse or Same-Sex Domestic Partner of Board of Directors Member        |
| <input type="checkbox"/> Boeing Retiree                   | <input type="checkbox"/> Spouse or Same-Sex Domestic Partner of Boeing Retiree                   |

Boeing Employee's BEMS ID: \_\_\_\_\_

If Retired or BEMS ID unknown, last 5 digits of SSN: \_\_\_\_\_

Boeing Employee First Name / Middle Initial / Last Name \_\_\_\_\_

Name of Organization Receiving Gift \_\_\_\_\_

Donor First Name / Middle Initial / Last Name (if different from employee name) \_\_\_\_\_

Organization City, State, Zip \_\_\_\_\_

Donor Address \_\_\_\_\_

Organization Web Address \_\_\_\_\_

Donor City, State, Zip \_\_\_\_\_

Gifts Should be Directed to Specific Department or Program  
(e.g. School of Engineering, Ready to Learn Program, etc.)

Donor Work Phone \_\_\_\_\_ Donor Home Phone \_\_\_\_\_

\_\_\_\_\_ \$  
Date of Gift (mm/dd/yyyy)      Gift Amount

Donor Email Address \_\_\_\_\_

\_\_\_\_\_  
Amount to be Matched (whole dollars)

Form of Gift:  Check     Securities

Name of Stock: \_\_\_\_\_

Is this gift being made by or through a community trust or similar organization, including charitable remainder trusts, donor advised funds or family foundations?  Yes     No

Number of Shares: \_\_\_\_\_

If yes, this gift can only be matched at the time of disbursement to the eligible not-for-profit.

*I hereby certify that the information I have provided on this form is complete and correct and that my gift fully complies with the program provisions on the reverse side of this form. I understand that only the tax-deductible portion of my donation is eligible for matching by The Boeing Company Charitable Trust; and I certify that neither I nor any member of my family has or will receive any direct personal benefit in connection with the tax-deductible portion of my gift.*

Donor Signature \_\_\_\_\_

Date \_\_\_\_\_

### PART B *(to be completed by receiving organization)*

**Complete Part B and return to: The Boeing Company Charitable Trust Gift Matching Program, P.O. Box 3723, Princeton, NJ 08543-3723**

For information: Toll Free: 888-531-GIFT (4438)      Fax: 609-799-8019      Email: boeing@easymatch.com

Name of Organization (use only the name reflected on IRS Form 501(c)3) \_\_\_\_\_

Federal Tax ID NO. (EIN) \_\_\_\_\_

Mailing Address \_\_\_\_\_

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

Contact Person Email Address \_\_\_\_\_

\_\_\_\_\_ \$      \_\_\_\_\_ \$  
Gift Amount      Tax Deductible Portion of Gift

The receiving organization is a (mark one):  Higher Ed. Institution     K-12 Ed. Institution     Arts and Cultural Organization

Conditions of participation in this program include, but are not limited to: the donee's acceptance of Boeing's right to audit any and all records of donations by Boeing personnel (active or retired) possessed or controlled by the donee; donee's full cooperation in any such audit; recognition by donee that Boeing may amend or terminate donee's eligibility to receive any funds or things of value without notice, at Boeing's sole discretion; donee's recognition that Boeing will report any potential irregularities regarding gifts to appropriate government authorities; Boeing may withhold matching funds in its sole discretion, including without limitation if there are indications that gift forms have been altered in any way or any of the rules relating to the program have been violated by either the donor or donee.

I hereby certify that the gift described in Part A above has been received by an organization that is eligible for Boeing gift matching under the programs provisions on the reverse side of this form and that the tax-deductible portion of the gift fully complies with such program provisions and that his organization is in full compliance with anti-terrorism requirements.

Contact Name \_\_\_\_\_ Title \_\_\_\_\_ Email Address \_\_\_\_\_

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



# The Boeing Company Charitable Trust Gift Matching Program



## FREQUENTLY ASKED QUESTIONS

### Q. Who is eligible?

A. Active employees, active employees of a wholly-owned subsidiary, retirees, and members of The Boeing Board of Directors and the spouses or same-sex domestic partners of any of the above mentioned participants.

### Q. What are the minimum and the maximum amounts that are matched for an employee?

A. The minimum match per eligible individual *per calendar year* is \$25, and the maximum is \$6,000 per individual or household. If both spouses or same-sex domestic partners are Boeing employees, the maximum amount per household is \$12,000.

Donations will be matched dollar-for-dollar to all eligible organizations for all eligible participants except retirees. Boeing retirees and their spouses or domestic partners donations will be matched at 50 percent (50 cents for every \$1 contributed) up to \$3,000 per year.

### Q. What organizations are eligible for matching gifts?

A. The match will be made to K-12 and higher education institutions, accredited technical schools, non-profit cultural and arts organizations, including nonprofits that support land trusts and publicly owned parks. To be sure of the institution's eligibility, review the gift matching form or contact the program administrator. The toll-free number is 888-531-GIFT (4438) or email [boeing@easymatch.com](mailto:boeing@easymatch.com)

### Q. Can I request matching funds any time during the year?

A. Yes. Gifts are eligible for matching up to one year from the date the gift was made. Matching checks will be distributed on a quarterly basis to eligible organizations.

### Q. Health and human service organizations are not in the list of eligible organizations. Why aren't they included in the new program?

A. Health & human service organizations are supported significantly with contributions through Employee Community Funds of The Boeing Company.

### Q. Can I use my BEMS ID on the Gift Matching form or should I use my social security number?

A. You should use your BEMS ID if you have one. If you do not have a BEMS ID, you may use the last 5 digits of your social security number.

### Q. Why does the form ask for the Board of Directors and Top 5 highest paid staff of an organization?

A. This information is required per compliance requirements with the Executive Order 13224, the USA-Patriot Act of 2001, the Office of Foreign Assets Control (OFAC) and the "Best Practices" document released by the Federal Department of Treasury. All either require or recommend increased due diligence in regard to "Watch Lists" or "Specially Designated Nationals (SDN) Lists". These lists have the names of companies, groups, and individuals who are connected with economic and trade sanctions based on U.S. foreign policy and national security goals targeted towards foreign countries, terrorists, international narcotics traffickers, and those engaged in activities related to the proliferation of weapons of mass destruction. All U.S. citizens and permanent resident aliens, entities within the United States, and all U.S. incorporated entities and their foreign branches are prohibited from dealing with SDNs. By following the guidelines set-forth by these Federal orders, Boeing is protecting investments made in the communities where our employees have designated to receive contributions.

### Q. Domestic Partners are now included as eligible participants for the gift matching program? What is the definition of a Domestic Partner?

A. Yes. Same-sex domestic partners are eligible. Boeing defines a domestic partner as:

*An individual of the same gender who lives with the employee in the same permanent residence in a permanent, exclusive, emotionally committed, and financially responsible relationship similar to a marriage. A domestic partner must be at least 18 years old, cannot be related to the employee by blood, cannot be married to or legally separated from another person, cannot be a domestic partner to anyone else, and cannot be in the relationship with the employee solely to obtain eligibility under the program.*

### Q. How do I know if the subsidiary I work for is eligible?

A. Active employees of wholly-owned subsidiaries are the only eligible gift matching participants. Please go to <http://law.whq.boeing.com/corpsec/subsidiarylist.pdf> to determine subsidiary eligibility.

### Q. Does Boeing audit the program?

A. Yes. When there is credible evidence that the program rules are being violated, payments are suspended to the organization, and civil and criminal authorities are notified in appropriate circumstances.

### Q. How do I find out how much I have given to the program and when my gift is matched?

A. All participants using the online program will have year-round visibility of their gifts. Participants may also call 1-888-531-GIFT to obtain this information.

### Q. What ID number do I use to log in to the Gift Matching website?

A. Please use your BOEING employee ID (BEMS ID) number as your user ID. Your password is the last 5 digits of your social security number. Every time you log in, you will need to provide your user ID and personal password to access the site.

### Q. Can retirees use the online program?

A. Yes, retirees can access the online program in Total Access through [www.boeing.com/express](http://www.boeing.com/express) under "My Community Giving".