

# Donor Matching Gift Eligibility Checklist

Use this checklist to determine if your donation is eligible for an employer matching gift and to keep a record for your files. Please fill in the text fields prior to printing.

## 1. Donor & Gift Information

- Donor Name:
- Employer / Company Name:
- Recipient Organization Name:
- Donation Date:
- Donation Amount (\$):

## 2. Employer Policy Requirements

Review your company's matching gift guidelines and fill in the details below:

- Donor Employment Status (Type: Full-time, Part-time, Retiree, or Spouse):
- Minimum Gift Amount Eligible for Match (\$):
- Maximum Match Limit per Employee per Year (\$):
- Employer Matching Ratio (e.g., 1:1, 2:1, 0.5:1):
- Submission Deadline (e.g., Dec 31st of donation year, or 1 year from date):

## 3. Recipient Organization Eligibility

Confirm the nonprofit meets your company's recipient criteria (Enter "Yes", "No", or "N/A" for each):

- Is the nonprofit registered as a 501(c)(3) organization?
- Are educational institutions eligible under your employer's policy?
- Are religious institutions eligible under your employer's policy?
- Are environmental and cultural organizations eligible under your employer's policy?

## 4. Submission Checklist & Verification

Complete these steps to finalize and track your match request:

- Has the donation receipt been saved and attached? (Enter Yes/No):
- Employer Matching Gift Portal Web Address:
- Date Match Request Submitted to Employer:
- Tracking or Confirmation Number (if applicable):
- Follow-up Date (to verify matching funds have been sent):

---

*Note: Keep a printed copy of this filled checklist along with your donation receipt for tax and tracking purposes.*