

## **Important reminder:**

**As of Jan. 1, 2012, the minimum qualifying donation amount increased to \$100. Donations from \$100 up to a maximum of \$2,000 will continue to be matched at fifty cents on the dollar.**

**Scroll down for matching gift guidelines and form.**

# **FIRST TENNESSEE FOUNDATION**

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## **MATCHING GIFT PROGRAM**

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### **Purpose**

The matching gift program is designed to encourage charitable contributions by First Horizon employees and to focus our corporate contributions on those tax exempt, nonprofit organizations most important to our employees.

### **Participation**

All First Horizon employees (full-time, part-time, prime-time) who have been actively employed for at least twelve months are eligible.

### **Eligible Organizations**

Most nonprofit organizations, with the exception of religious, fraternal and political organizations, that have proof of tax-exempt status under Section 501(c)3 of the Internal Revenue code are eligible to receive matching funds. All educational institutions must also provide proof of accreditation.

### **Non-eligible Organizations**

The First Tennessee Foundation will not match contributions to political organizations, churches or other religious groups. Dues for membership fees for professional, social or recreational groups such as YMCA, YWCA, Fraternal Order of Police or Veterans organizations will not be matched. Registration fees, subscriptions, and tuition for little league, museums, programs, camps, bike races or the like will not be matched. Contributions to United Ways in Tennessee will not be matched as the Foundation makes direct contributions to local annual fund drives.

### **Conditions**

The First Tennessee Foundation will match individual employee contributions fifty cents on the dollar from a minimum of \$100 to a maximum of \$2,000 per employee per calendar year (this means the Foundation cost is \$50 - \$1,000 per employee). Contributions can be made to more than one organization, but the total amount of all contributions cannot exceed the \$2000 per employee (\$1,000 matched by the company) in one calendar year. Only cash, check and credit card gifts are matched. Gifts of stock or securities are eligible for matching if the nonprofit provides the redemption value of the gift. Funds for the Matching Gift Program are budgeted annually and are made to eligible organizations on a first-come, first-serve basis until budgeted funds are depleted. If a request for a matching gift is received after budgeted funds are depleted, the request will be held until the next calendar year. Matching information must be received by March 31 of the year following the year the gift was made to be eligible for matching.

**Instructions**

An eligible First Horizon employee making a contribution should fill out Part A of the Matching Gift Form and send the entire form, along with the gift, to the recipient organization. The recipient organization will complete Part B of the Matching Gift Form, attach a copy of its IRS determination letter, a copy of the most recent financial statement, a list of its board members and a copy of the employee's gift, and return it to:

First Horizon Matching Gift Program  
c/o Erica Wilkins  
PO Box 84, MO-12  
Memphis, TN 38101

*Failure to complete the form in its entirety or to provide proof of tax-exempt status under Section 501(c)3 of the Internal Revenue Code will result in denial of the matching gift request.*

**Administration**

The First Tennessee Foundation reserves the right to amend the provisions or discontinue this plan at any time. Decisions regarding administration and interpretation of this program rest solely on First Tennessee Foundation and are final.

**Availability of forms**

The matching gift form is available on FirstNet or by calling Erica Wilkins of corporate communications at (901)523-4295.

**Questions**

Contact Erica Wilkins of corporate communications at (901)523-4295 or [EEWilkins@FirstHorizon.com](mailto:EEWilkins@FirstHorizon.com).

**FIRST TENNESSEE FOUNDATION  
MATCHING GIFT FORM**

**PART A** (To be filled out by the contributing employee, who is to send this form along with the contribution to the eligible institution or organization.)

\_\_\_\_\_  
EXACT DATE OF GIFT

To: \_\_\_\_\_  
NAME AND ADDRESS OF ELIGIBLE ORGANIZATION

To the best of my knowledge and belief, you are an organization that is eligible to receive a grant under the matching gift program of First Horizon (matching 50 cents for each dollar contributed from \$100 up to \$2,000) and are a tax-exempt non-profit organization under Section 501(c)3 of the Internal Revenue Code, as amended.

\_\_\_\_\_  
FHN EMPLOYEE NUMBER

\_\_\_\_\_  
SIGNATURE OF FHN CONTRIBUTOR

\_\_\_\_\_  
WORK STREET ADDRESS

\_\_\_\_\_  
PRINT FULL NAME OF FHN EMPLOYEE

\_\_\_\_\_  
CITY STATE ZIP

\_\_\_\_\_  
HOME STREET ADDRESS

\_\_\_\_\_  
DATE OF HIRE

\_\_\_\_\_  
CITY STATE ZIP

**PART B** (To be completed by recipient's financial officer and sent, with (1) Part A, (2) a copy of IRS Determination Letter, (3) a list of board members and (4) a copy of the contribution, to First Horizon Matching Gift Program, c/o Erica Wilkins, PO Box 84 MO-12, Memphis, TN 38101, for certification as an organization eligible for a matching gift.)

**RECIPIENT CERTIFICATION FORM**

The gift described in Part A, in the amount of \$\_\_\_\_\_ made by \_\_\_\_\_

was received on \_\_\_\_\_ by \_\_\_\_\_

\_\_\_\_\_  
NAME AND ADDRESS OF ORGANIZATION

which I certify is a tax-exempt non-profit organization under Section 501(c)3 of the Internal Revenue Code, as amended.

**IMPORTANT**

Attach a copy of:

1. The IRS tax-exempt determination letter of your organization
2. Copy of the received contribution
3. Copy of board list

\_\_\_\_\_  
SIGNATURE OF RECIPIENT'S FINANCIAL OFF.

\_\_\_\_\_  
PRINT NAME AND TITLE

\_\_\_\_\_  
PHONE NUMBER