



## Matching Program Guidelines for U.S.A. Based Employees

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### How the Match works

To better connect with the employee base at Ulbrich Stainless Steels & Special Metals, Inc., the Ulbrich Matching Program was created in order to support charities and community events employees are directly involved with.

Effective January 1, 2020, Ulbrich Steel will match up to \$250 dollars per calendar year, per employee, to any number of eligible organizations, prior approval from the Ulbrich Philanthropy Committee.

Please complete the attached Matching Program Request Form on the following page. Request forms must be submitted for approval within six months of the event. Please send the form to: [philanthropy1924@ulbrich.com](mailto:philanthropy1924@ulbrich.com), or feel free to print the form out and hand deliver to Human Resources (1 Dudley Ave, Wallingford, CT, 06492).

### Who is Eligible

- Full time employees with 12 consecutive months of service at any of the Ulbrich U.S.A. based facilities.

### What is Eligible

Specific events with employee involvement:

- Benefiting non-profit organizations (certified as tax-exempt by the U.S. Internal Revenue Service under Section 501(c)(3) and 509 (a)(1, 2 or 3) of the Internal Revenue Code).
- A community foundation or a family fund supporting an eligible non-profit organization.
- Projects that provide needed social services to the community at a large on a nondiscriminatory basis without any religious or political directive.

### What is not Eligible

- Contributions which result in you or a family member receiving specific benefits (e.g., boosters, auction items, dinner, ads, sponsorships, golf tournaments, etc.).
- Gifts to schools and colleges and their affiliated foundations (including tuition fees, student loans, sport teams or departments funding or equipment, etc.).
- Religious and political organizations and individuals.

Note to employees:

The Ulbrich Family Philanthropy Committee, on behalf of the Ulbrich Family and Ulbrich Stainless Steels & Special Metals, Inc., in its sole discretion, reserves the right to discontinue, audit, amend or decide any questions of eligibility under the Matching Program. Its decisions on these matters are final.

Matching requests will be reviewed and approved within 30 days of submission.



## Matching Program Request Form for U.S.A. Based Employees

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Employee Name \_\_\_\_\_

Street Address \_\_\_\_\_

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

Phone Number Home \_\_\_\_\_ Cell \_\_\_\_\_

Email Address \_\_\_\_\_ Date of Hire: \_\_\_\_\_

Employee Number (please contact HR for your specific number) \_\_\_\_\_

Division Name: (Check one)      UOI      UNE      UPFW      USW      USSM      Corporate

If Applicable:

Tax-exempt Organization Name \_\_\_\_\_

Federal Tax ID (9 Digit EIN#) \_\_\_\_\_

Name of Event \_\_\_\_\_ Date of Event \_\_\_\_\_

Amount Requested (\$250 Max) \_\_\_\_\_ Date Requested Donation By \_\_\_\_\_

Explanation of charitable fundraising event

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Note:

Please attach a copy of personally fundraised amount and a brochure, if applicable, describing the program and mission.

I hereby certify that:

- I have read and comply with the guidelines of the Ulbrich Matching Program.
- The above donation is entirely my personal contribution, not made from a business account.
- All information is accurate and truthful.
- To the best of my knowledge this nonprofit, its staff and its programs conform to the eligibility guidelines of the Ulbrich Matching Program.

Signature \_\_\_\_\_

Date \_\_\_\_\_