



## AAON Matching Gifts Program Instructions

AAON Team Member,

AAON has allocated \$100,000 to match team member contributions to qualifying nonprofit organizations in 2021. These funds are available on a first come, first serve basis. To submit your eligible contributions for matching, follow the instructions below.

1. Review matching gift program guidelines
2. After making a contribution to an eligible nonprofit, team member completes part A of the matching gifts form
3. Team member sends matching gifts form to recipient nonprofit organization to verify the contribution and complete part B
4. Recipient nonprofit organization returns matching gifts form to AAON for review
5. Forms are reviewed, eligible contributions are recorded and matching gifts are mailed to recipient nonprofits

For questions about this program, contact [matchinggifts@aaon.com](mailto:matchinggifts@aaon.com) or [stephaniec@aaon.com](mailto:stephaniec@aaon.com).



## Matching Gifts Program Guidelines

### Parameters:

Gifts to eligible 501(c)(3) organizations, public or private schools, colleges/universities are matched dollar-for-dollar, up to (\$1,000) per team member, per calendar year.

### Team Member and Gift Eligibility

AAON supports full-time and part-time employees through this matching gift program by matching donations made to eligible U.S. based 501(c)(3) charities. The contribution must be paid, not merely pledged, with a minimum of \$100 of the employee's own funds. The donor can receive no direct benefit, reward or consideration when making the donation. The gift must be a personal donation of the employee and not the result of collection from multiple persons through fundraising efforts. Gifts registered after 6 months of the gift date will not be eligible. Gifts made from business accounts, a spouse's or domestic partner's individual account, or a separate foundation will not be eligible.

### Organization Eligibility

**Eligible Recipient Organizations:** All organizations must be approved by AAON through the process outlined below and must confirm compliance with program criteria to participate in the program.

- The following types of organizations may be eligible to participate in the program: (excluding those listed in the "Ineligible Recipient Organizations" section): most organizations that are qualified by the Internal Revenue Service as a charity having tax-exempt status under section 501(c)(3) of the Internal Revenue Code. Subject areas include – but are not limited to – the following broadly defined areas: Arts and Culture, Education, Environment and Community/Human Services.
- U.S. local and state government owned and operated entities such as public schools, publicly owned and operated museums, public libraries and zoos.
- Accredited educational institutions that are exempt from federal taxes under Section 501(c)(3) of the Internal Revenue Code.

**Ineligible Recipient Organizations:** Ineligible organizations include, but are not limited to the following (please note that this list may be expanded or amended at any time):

- Non-501(c)(3) organizations charities
- Labor, fraternal, trade, political causes, chambers of commerce, professional membership societies, private or family foundations
- Donations where requestor receives a benefit including: membership dues, purchase of an auction item, tickets to events, entry fees for individuals or groups

- Religious organizations (churches, synagogues, mosques, ministries, seminaries and other houses of worship), or other organizations primarily promoting religious purposes. Other faith-based community service organization or schools may be considered eligible if they:
  - Serve a secular purpose, such as food pantry, homeless shelter or education
  - Do not require participation in prayer, worship or other religious activities as a condition of receiving service(s) offered; and do not use the individual donation or resulting match for religious purposes
- Advertising, branding or marketing campaigns for AAON products and services that are not charitable in nature.
- Tuition, fees or payments in lieu of tuition
- Athletic organizations such as funds, foundations, scholarships or booster clubs
- Alumni dues and memberships
- Organizations that would represent a conflict of interest with AAON or its businesses and affiliates
- Groups that address issues by means of adversarial or confrontational tactics
- Donor-Advised Funds
- Any organization that discriminates based on race, religion, color, sex, sexual orientation, gender identity, age, national origin, ancestry, citizenship, veteran, or disability status, or espouses hate.

### **Administration of the Program**

AAON regularly evaluates our programs to ensure the process adheres to stated guidelines and our commitment to corporate social responsibility, including random reviews of organizations receiving matching funds from our programs. Organizations selected for review will be required to provide documentation verifying receipt of individual donations for each recipient.

AAON is under no obligation by reason of any participant's application to the program to match funds, and we reserve the right to decline match donation to organizations that might represent a conflict of interest with AAON's business interests or its reputation or relationship with others.

AAON may suspend, change or terminate this program at any time. Make sure you are familiar with the matching gift program rules. Failure to abide by these rules or providing false or misleading information in connection with a matching gift request could result in disciplinary action up to and including termination, as well as possible civil or criminal liability. AAON reserves the right, in its sole discretion, to discontinue funding and demand the return of the matching gift grant amount, or any portion thereof, and any income earned thereon, if you provide AAON with any false or misleading information or make any misrepresentations in connection with this request for a matching gift.

# AAON, Inc. Matching Gift Form

## Part A – TO BE COMPLETED BY DONOR

The Company will match contributions of up to \$1,000 per team member, per calendar year.

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

Home Address \_\_\_\_\_

City/State/Zip Code \_\_\_\_\_

Email address \_\_\_\_\_ Work Location (city) \_\_\_\_\_

Daytime Phone \_\_\_\_\_

**Individual Gift** Minimum Contribution: \$100

Please specify the \$ amount to be Matched \$ \_\_\_\_\_

Organization Receiving Gift: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip Code \_\_\_\_\_

**Exact Date of Gift** \_\_\_\_\_

Made by: \_\_\_ Cash \_\_\_ Check \_\_\_ Credit Card \_\_\_

I certify that this gift meets with all the specifications as described in the company information as it relates to matching gifts. I am currently an eligible employee of AAON, Inc.

**Signature of donor** \_\_\_\_\_

**Date** \_\_\_\_\_

## Part B TO BE COMPLETED BY RECIPIENT INSTITUTION

1. Verify donor section. Fill out Part B Completely.
2. Mail or email this form along with a photocopy of the check or proof of credit card donation along with a W-9 to AAON, Inc. 2425 S Yukon Ave Tulsa, OK 74107 Attn: Stephanie Cameron or [matchinggifts@aaon.com](mailto:matchinggifts@aaon.com).

I certify that this institution is recognized as a tax-exempt public charity (not a private foundation) by the IRS under Section 501 (c) (3) and that the donor has received no benefit, reward or consideration as a result of this contribution. A copy of your Section 501 (c) (3) letter dated with the current year must be included along with a W-9. Failure to include these may prevent processing.

Donor \_\_\_\_\_ Amount \_\_\_\_\_

Date Received \_\_\_\_\_ Organization \_\_\_\_\_

Tax ID \_\_\_\_\_ Email address \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ City/State ZIP \_\_\_\_\_

Signature of Officer (not a stamp) \_\_\_\_\_

Print or type Full Name and Title of Officer \_\_\_\_\_