



*Last Updated: May 2007*

## **I.14 Processing Matching Gift Forms**

- ***Matching Gift Forms from UAF, UAS, or SW*** are to be sent to the Foundation Office in Fairbanks and completed (usually section 2) by the Foundation Administrative Assistant. The form(s) should then be forwarded to the Foundation President to sign on behalf of the Foundation. Once the President's signature is obtained the form(s), along with a copy of the Foundation 501c3 letter, should be mailed to the Matching Gift Company for processing.
- ***Matching Gift Forms from UAA*** are to be sent to the User Relations Manager in the Anchorage Foundation Office. He/She will complete (usually section 2) and sign the form(s) on behalf of the Foundation and send to the Matching Gift Company for processing along with a copy of the Foundation 501c3 letter. In addition, the User Relations Manager will forward a copy of the completed form(s) to the Administrative Assistant in the Foundation office in Fairbanks for filing.
- ***Before completing and signing the form(s)***, the Administrative Assistant or User Relations Manager will check RE to make sure that the gift(s) has been batched in RE. NOTE: Forms will **not** be signed and forwarded to the Matching Gift Company until the gift(s) has been batched and committed in RE.
- ***The Administrative Assistant will file copies*** of everything in the read file before mailing to the Match Gift Company (except in Anchorage). In addition a full copy of all paperwork should be filed in the "Unmatched Gifts" binder located in the cabinet above the Administrative Assistant's desk so that when the matching gift is received all pertinent information is readily available.
- ***When the matching gift is received at the Foundation*** the Administrative Assistant will take the paperwork out of the "Unmatched Gifts" binder and attach it to the match gift. He/she will deposit and batch the match gift as normal. Once the gift has been fully processed, a full copy of all paperwork including the deposit ticket and signed transmittal form for the match gift will be filed in the "Matched Gifts" binder located above the Administrative Assistant's desk.