



Matching First-Time Gifts to Jewish Day Schools

SECTION 3 DONOR APPLICATION

To be completed by the donor

Please print clearly and complete all questions.

Donor Information

Donor Name: _____

Contact Email: _____

Daytime Phone Number: _____

Address (complete mailing address):

Name of Second Donor (Spouse/Significant Other): _____

Organization/Foundation Affiliation (*leave blank if donation is not via a foundation or other organization*):

Gift Information

Name of Jewish Day School Your Gift Will Support: _____

Total Gift Amount (Canadian dollars): _____

What are you supporting with this grant?

- _____ General Operating Support
- _____ Program Expenses – Please specify: _____
- _____ Endowment
- _____ Other – Please specify: _____

How are you involved with this specific day school? Please check ALL that apply:

- | | |
|-----------------------------------------|---------------------------------------------------------------------------------------------------|
| _____ Local community member | _____ Grandchild/Grandchildren currently attend |
| _____ Member of day school’s board | _____ Grandchild/Grandchildren are alumni |
| _____ Past member of day school’s board | _____ Other – Please provide a brief description of your relationship to the day school:
_____ |
| _____ Alumna/Alumnus | |
| _____ Child/Children currently attend | |
| _____ Child/Children are alumni | |

Previous Philanthropic Contributions

Have you or your spouse made any previous philanthropic contributions to a Jewish day school?
(Foundations: has your foundation made any previous philanthropic contributions to a Jewish day school?)

_____ Yes
_____ No

If you answer "yes" to the question above, please provide information about your largest previous gift in the spaces below. PLEASE NOTE: For eligibility purposes, your largest previous gift is your largest previous individual gift or pledge, or the largest cumulative amount of giving to Jewish day schools in a school's fiscal year. Past pledges to a Jewish day school that were paid as multi-year grants will be considered as the sum total of the pledge and not the amount of the grant paid in each year.

Tell us about the **largest previous gift**, made by you or your spouse or your Foundation, to a Jewish day school in the past three years in Canadian dollars.

Amount: \$ _____

Name of Recipient Organization, School or Project:

Date of Gift: _____

Recipient Organization's Contact Person:

Name: _____

Phone: _____

Email: _____

Please list all other gifts to Jewish day schools made by either you, your spouse or your Foundation in the past three years. Include the name of the organization, gift date and total gift amount. Include the type of gift where applicable (e.g. Shalom Day School, June 2010, \$5,000, Annual Campaign).

Grant Eligibility Criteria

Is this your and your spouse's or your Foundation's first gift to a Jewish day school in the past three years?

_____ Yes, this is my/our first gift to a Jewish day school in the past three years.
_____ No, I / we have given a gift to a Jewish day school in the past three years.

I / We answered "No" above and my/our new gift of \$5,000 or more is at least a five times increase from my/our largest previous gift to a Jewish day school in the past three years.

- Yes
- No

The largest previous gift to a Jewish day school in the past three years is calculated based upon the donor's largest previous individual gift OR the largest cumulative amount of giving to Jewish day schools in a school's fiscal year; whichever amount is higher. Past pledges to a Jewish day school that were paid as multi-year gifts will be considered as the sum of the total of the pledge and not the amount of the gift paid in each year. Did you calculate your new gift according to these guidelines?

- Yes
- No
- Not applicable, first time gift to a Jewish day school

Will your gift be used only for general operating support, program expenses, or endowment?

- Yes
- No

Will your gift be used for a capital campaign?

- Yes
- No

I / We will not receive any tuition benefits from this gift.

- Yes, I / we will not receive any tuition benefits from this gift.
- No, I / we will receive tuition benefits from this gift.

Additional Donor Information

Please identify your age group:

- 40 and below
- 41-65
- Over 65

Have you previously considered making a grant of CAD \$5,000 or more to a Jewish day school?

- Yes
- No

How significant is MATCH in your decision to make a gift now?

- Very Significant
- Significant
- Neutral
- Somewhat Significant
- Not at all Significant

Would you be willing to share information with us about your MATCH funding experience for use in our publicity materials?

- Yes
- No

How did you learn about MATCH?

- Personal Contact
- Development Professional
- Other – Please Specify: _____

Terms and Conditions

All applications will be reviewed by representatives of MATCH and all decisions of eligibility will be at the sole discretion of MATCH. The determinations of MATCH shall be final, binding and conclusive as to all questions and decisions of donor eligibility, school eligibility and grants.

Grant eligibility will be determined according to amount and payment in Canadian dollars. Matching grants are only available for gifts payable to a Jewish day school between **September 1, 2015** and **December 31, 2016**.

Matching grants are available only for a minimum gift of \$5,000 and will be matched to a maximum of \$50,000 per school. Gifts must be cash (checks or wire transfers) or transfers of publicly traded stock. Credit card payments, illiquid stocks, annuities, Israel Bonds, or other slowly maturing instruments are not allowed. Gifts that are made in the form of tangible goods such as Torah scrolls, land, computer equipment or any other items given in place of cash or stock cannot be matched.

Completed applications must be submitted no later than 5:00 pm EST, **August 31, 2016**. Submission of an application prior to the deadline does NOT guarantee matching funds. All applications will be reviewed on a rolling basis starting **September 17, 2015** by a committee comprised of MATCH representatives and all decisions will be at their sole discretion. The determination of MATCH shall be final, binding and conclusive as to all questions and decisions of eligibility and grants.

Matching grants will be paid once donors and schools are notified of the award and payment of the approved gift by the donor to the school is verified. MATCH requires a copy of a canceled check (both sides), the wire receipt for the amount of the gift or other proof deemed satisfactory by MATCH for payment verification purposes. Matching funds will not be issued unless proper gift documentation is on file. Please review the complete MATCH Payment Verification Procedures available at www.dayschoolmatch.org/montreal.

MATCH and its Funders do not make any statement or representation as to the tax consequences of the receipt by a Grantee of any award, grant or funds from the program. Donors and prospective donors should consult their own tax, accounting and legal advisers regarding the tax or other treatment of matching grants. The terms and conditions and availability of MATCH Matching Grants are subject to change and/or termination at any time.

I have read, understand and agree to all of the Terms and Conditions of MATCH, the Jewish Day School Matching Grants Initiative as set forth by MATCH.

Yes, I/we agree to the terms and conditions of MATCH.

No, I/we do not agree to the terms and conditions of MATCH.

Signature of Donor: _____

Date: _____