

Educational Matching Gift Guidelines

To encourage and support the generosity and community involvement of team members, Wells Fargo is proud to offer the Wells Fargo Matching Gifts Program. Through this program, team members may request a matching gift from Wells Fargo following their act of giving a personal donation to an eligible charitable organization.

The Program

At Wells Fargo, we recognize that our company, stockholders, team members, and communities all benefit when educational institutions are supported. The Educational Matching Gift Program matches team members' donations to any eligible accredited school — dollar for dollar, up to \$6,500 per team member, per year.

Eligible Participants

All regular, part-time, or flexible team members of Wells Fargo or any of its subsidiaries are eligible and encouraged to participate. Active Executive Board Members are also eligible.

Eligible Organizations

Accredited educational institutions:

- Public and private
- Prekindergarten
- Elementary schools
- Secondary schools
- Junior colleges
- Colleges
- Graduate schools
- Technical or vocational schools
- School districts
- Educational foundations that support schools located within the United States

Please note, all schools must be nonprofit, tax-exempt organizations, designated 501(c)(3) by the IRS.

Wells Fargo's matching gift will be considered as unrestricted general support to the school.

Eligible Donations

- Must be from the team member's personal funds, which has been paid directly to an approved school.
- The minimum eligible gift for matching is \$25. For installment gifts, each match request must be submitted separately and meet the \$25 minimum gift requirement.
- The annual limit for each donor is \$6,500 and is based on the date of the gift.
- Gifts must be in the form of check, credit card, or marketable securities with a quoted market value. Checks written from a family foundation or trust are not eligible for a match.
- Gifts of securities are valued based on the average of the high and low on the date of the gift. No other form of personal or real property will be matched.

Matching gift disbursements are made by our program administrator, JK Group, Inc., based in Princeton, NJ.

Eligible gifts are processed monthly.

[Please direct matching gift questions to 1-888-518-4438 or email wellsfargo@easymatch.com.]

Noneligible Donations

- Gifts made in lieu of tuition payment for services
- Subscription, membership, or any other fees for which benefits are received.
- Gifts of real or personal property
- Cumulative gifts from several individuals reported as one contribution
- Gifts to organizations that support schools, but are not schools or foundations that support schools
- Gifts made by or through community trusts or similar organizations, including charitable remainder trusts, donor advised funds, or family foundations

Qualifying Gifts

Contributions must be given, not just pledged. Qualifying gifts will be matched from \$25 – \$6,500 per team member, per calendar year. Tuition, fees, repayment of loans, charges fixed by a school as a condition of enrollment, fees associated with club and alumni membership, or other fees incurred while in attendance at a school do not qualify under this program.

Eligible participants may request that a gift be matched up to one calendar year after the gift has been made.

Wells Fargo reserves the right to approve or decline a match request.

Matching Gift Forms

Matching gift forms may be obtained through Forms Online (form number HRS3924). Active executive board members may obtain forms by contacting Community Support Programs at 1-866-229-9382.

Educational Matching Gift Program Request

PART 1 — FOR TEAM MEMBER

Instructions for team member: Complete Part 1 of this form. Complete one form for each gift. Please print or type. Send this form and a copy of the program guidelines to the recipient organization.

| | | | |
|--|---------------------------|---------------------------------|----------------|
| Team Member Name | | | |
| Team Member Employee Number | | | |
| Address | | | |
| City | | State | ZIP Code |
| Work Phone (including area code) | | Email Address | |
| Exact Date of Gift | Amount of Gift (min \$25) | Amount to Be Matched (min \$25) | |
| I made my donation by (please check one): | | | |
| <input type="checkbox"/> Check/Credit Card <input type="checkbox"/> Stock/Securities | | | |
| If stock/securities, list the number of shares and name of securities/stock: | | | |
| Name of Accredited Educational Institution | | | City and State |

I hereby certify that:

- Neither my family nor I will derive any direct or indirect financial or material benefit from this contribution.
- I authorize the above-named school to report this gift to Wells Fargo for the purpose of applying for a matching gift.
- My gift is a voluntary contribution, that it fully complies with the provisions of the program described herein and does not represent in any way a fee for a service or benefit.
- I have not been nor will I be reimbursed or compensated by anyone for this contribution.
- I have read and understood the guidelines of the Wells Fargo Educational Matching Gift Program.
- Any misrepresentation by me of the statements made herein will forfeit my rights to any matching contributions.
- By signing this document, I understand that any misrepresentation of information violates Wells Fargo's Code of Ethics and Business Conduct.

| | |
|--------------------------|------|
| Signature of Team Member | Date |
|--------------------------|------|

PART 2 — FOR RECIPIENT ORGANIZATION

Instructions for recipient organization: Verify receipt of gift. Complete Part 2 of this form. Please print or type. If this is your first matching gift request to the Wells Fargo Educational Matching Gift Program, please forward a brief description of your organization's primary mission statement or purpose. Forward the form and attachment(s) to the address below.

| | | | |
|--------------------------------------|--|----------------------------|----------|
| Employer Identification Number (EIN) | Name of Accredited Educational Institution | | |
| Mailing Address | | | |
| City | | State | ZIP Code |
| Telephone (including area code) | | Fax (including area code) | |
| Email Address | | Website Address | |
| Date Gift Received | Amount of Gift | Tax Deductible Gift Amount | |

I hereby certify that:

- This accredited education institution meets the eligibility requirements of the Wells Fargo Educational Matching Gift Program.
- Neither the donor nor Wells Fargo will derive any personal material benefit from this gift or match.
- This institution is in full compliance with the anti-terrorism laws legislated by the USA Patriot Act. In addition, by countersigning the matching gift application, I agree that this institution will not promote or engage in violence, terrorism, bigotry, or the destruction of any state, nor will it make subgrants to any entity that engages in these activities.
- I am authorized to attest to the above statements and have sufficient knowledge to do so.
- I have read and understand the guidelines of the Wells Fargo Educational Matching Gift Program.

| | |
|--|------|
| Authorized School Personnel Name | |
| Title | Date |
| Signature of Authorized School Personnel | |

**Completed forms should be received within six (6) months of the date of gift. Failure to complete this form will delay processing.*

MAIL COMPLETED FORM AND REQUIRED ENCLOSURES TO:
 Wells Fargo Educational Matching Gift Program
 JK Group, Inc., P.O. Box 2157, Princeton, NJ 08543-2157
 Phone: 1-888-518-4438