



Matching Gifts Guidelines

Xcel Energy will match your gifts to charitable organizations and institutions of higher education

Statement of Purpose

Xcel Energy's Matching Gifts program is intended to:

- Support our employees' and retirees' investments in organizations that add value to our communities;
- Empower our employees and retirees with the responsibility for choosing how we invest charitable dollars;
- Enhance the economic vitality and well-being of the communities in our service areas.

How it works

Xcel Energy will double your gifts to eligible organizations, as follows:

- Qualified nonprofit organizations with 501(c)(3) Internal Revenue Service (IRS) status; and
- All post-secondary, two- and four-year public and private colleges, universities, graduate/ professional schools and seminaries located in the United States.
- All full and part-time employees and retirees are eligible to participate in the Matching Gifts program. Contract or temporary employees, spouses, family members and employees on leave are not eligible.
- In accordance with IRS regulations, donations must be philanthropic gifts to the organization, without any financial or material benefit to the donor.

Gifts to Nonprofit Organizations

Gifts of \$50 or more will be matched up to \$750 per calendar year for each participant. Matching funds will be granted only to qualified nonprofit organizations that present a 501(c)(3) IRS determination letter. HOWEVER, due to the nature of monthly recurring deductions, a minimum of \$5.00 per pay period is required.

Ineligible gifts

- Gifts to private foundations, churches or public or private K-12 schools (See note below)*
- Pledges, bequests, gifts to individuals, in-kind gifts (e.g. gifts of stock, artwork, livestock, payment of insurance premiums and real or personal property)
- Gifts to political campaigns or to influence legislation
- Gifts to the United Way or other federated giving campaigns (these are matched automatically; you need not complete this form)
- Gifts that benefit individuals, such as financial aid, tuition, books or student fees
- Pledges, third-party or pooled gifts
- Gifts to capital campaigns, a time-limited effort by a nonprofit organization to raise significant dollars for a specific project, usually a building.

*NOTE: Ineligible IRS Tax Status sub-section codes:

Organizations with a 501c3 designation with a sub-section 170(B)(1)(a)(i) or 509(A)(3)

Gifts to Higher Education

Gifts of \$50 or more to higher education will be matched up to \$2,000 per participant per calendar year.

Ineligible gifts

- Gifts that benefit specific individuals, such as financial aid, tuition, books or student fees
- Athletic, recreation or social events
- Pledges, third-party or pooled gifts
- Payments to umbrella organizations.