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**PENN-AIR & HYDRAULICS CORP.**  
**MATCHING GIFTS PROGRAM**



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## **PENN-AIR & HYDRAULICS CORP. MATCHING GIFTS PROGRAM**

### **I. THE PROGRAM**

PENN-AIR & HYDRAULICS CORP. IS PLEASED TO INTRODUCE A CORPORATE MATCHING GIFTS PROGRAM IN 2011, TO ENCOURAGE FULL TIME, PART TIME AND RETIRED ASSOCIATES IN THEIR PERSONAL PHILANTHROPY, BY PROVIDING A DOLLAR-FOR-DOLLAR MATCH. THE VOLUNTARY PROGRAM IS DESIGNED TO PROVIDE PARTICIPANTS WITH AN ADDITIONAL INCENTIVE TO MAKE PERIODIC COMMUNITY SERVICE AND FINANCIAL CONTRIBUTIONS BENEFITING ELIGIBLE ORGANIZATIONS OF THEIR OWN CHOOSING. PENN-AIR & HYDRAULICS CORP. MATCHING GIFTS PROGRAM WILL SERVE AS AN IMPORTANT ELEMENT TO COMPLIMENT THE CORPORATION'S MISSION OF HELPING PEOPLE, AND SERVING OTHERS IN OUR COMMUNITIES. OPPORTUNITIES TO PARTICIPATE AND SERVE COME TO THE ORGANIZATION REGULARLY SO THE OWNERS OF THE CORPORATION WILL NOW MAKE THIS INFORMATION AVAILABLE TO ALL ASSOCIATES.

### **II. ELIGIBLE PENN-AIR & HYDRAULICS CORP. PARTICIPANTS**

ELIGIBLE PARTICIPANTS ARE LIMITED TO:

- A. FULL TIME AND PART TIME ASSOCIATES OF THE PENN-AIR & HYDRAULICS CORP. ON THE DATE(S) THE GIFT WAS MADE AND REGISTERED.**
- B. ASSOCIATES WHO HAVE FULLY RETIRED DIRECTLY FROM THE PENN-AIR & HYDRAULICS CORP.. RETIREE STATUS MUST BE CURRENT ON THE DATE(S) THE GIFT WAS MADE AND REGISTERED.**

### **III. RECIPIENT ORGANIZATION ELIGIBILITY**

#### **A. ELIGIBLE RECIPIENT ORGANIZATIONS**

- 1. PARTICIPATING ORGANIZATIONS MUST BE ONE OF THE FOLLOWING (EXCLUDING THOSE LISTED IN THE "INELIGIBLE RECIPIENT ORGANIZATIONS" SECTION):**
  - A. RECOGNIZED BY THE UNITED STATES I.R.S. AS A 501(C)(3) CHARITABLE ORGANIZATION; OR**
  - B. ACCREDITED PUBLIC PREK-12 SCHOOLS OR SCHOOL DISTRICTS TO WHICH CONTRIBUTIONS ARE TAX DEDUCTIBLE UNDER THE INTERNAL REVENUE CODE OF THE UNITED STATES; OR**
  - C. ACCREDITED PUBLIC OR NON-PROFIT COLLEGES AND UNIVERSITIES TO WHICH CONTRIBUTIONS ARE TAX DEDUCTIBLE UNDER THE INTERNAL REVENUE CODE OF THE UNITED STATES.**
- 2. ALL ORGANIZATIONS MUST BE APPROVED BY PENN-AIR & HYDRAULICS CORP. AND MUST CONFIRM COMPLIANCE WITH PROGRAM CRITERIA TO PARTICIPATE IN THE PROGRAM.**



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## **B. INELIGIBLE RECIPIENT ORGANIZATIONS**

INELIGIBLE ORGANIZATIONS INCLUDE, BUT ARE NOT LIMITED TO THE FOLLOWING (PLEASE NOTE THAT THIS LIST IS REPRESENTATIVE OF FREQUENT QUESTIONS AND MAY BE EXPANDED OR AMENDED BY PENN-AIR & HYDRAULICS CORP.):

1. UNITED WAYS (E.G. UNITED WAY OF YORK COUNTY, UNITED WAY OF SOUTHEASTERN PA, ETC.).
2. POLITICAL ORGANIZATIONS
3. DONOR ADVISED FUNDS, PRIVATE FOUNDATIONS AND PERSONAL TRUSTS.
4. ORGANIZATIONS THAT DO NOT COMPLY WITH PENN-AIR & HYDRAULIC CORP.'S NON-DISCRIMINATION POLICY (I.E. ORGANIZATIONS THAT DISCRIMINATE ON THE BASIS OF A PERSON'S RACE, COLOR, RELIGION, NATIONAL ORIGIN, SEX (INCLUDING PREGNANCY), SEXUAL ORIENTATION, AGE, DISABILITY, VETERAN STATUS OR OTHER CHARACTERISTIC PROTECTED BY LAW).
5. ORGANIZATIONS THAT DO NOT COMPLY WITH THE USA PATRIOT ACT
6. PENN-AIR & HYDRAULICS CORP. RESERVES THE RIGHT TO EXAMINE AND EXCLUDE ORGANIZATIONS AND GIFTS AS IT DEEMS APPROPRIATE.

## **IV. GIFTS**

### **A. ELIGIBLE GIFTS**

PENN-AIR & HYDRAULICS CORP. WILL MATCH THE FOLLOWING:

1. GIFTS MUST BE A TAX-DEDUCTIBLE CONTRIBUTION OF U.S. \$50 OR MORE AND MUST BE PAID DIRECTLY BY THE PENN-AIR & HYDRAULICS CORP. CONTRIBUTOR TO THE ELIGIBLE ORGANIZATION OR INSTITUTION (PLEASE NOTE EXCEPTIONS IN "INELIGIBLE GIFTS" SECTION). ANY NON-DEDUCTIBLE PORTION OF A GIFT WILL NOT BE MATCHED.
2. GIFTS MUST BE CURRENT CONTRIBUTIONS FROM THE PENN-AIR & HYDRAULICS CORP. ASSOCIATE/RETIREE'S OWN ASSETS. GIFTS MUST BE MADE, NOT MERELY PLEDGED. A MATCHING GIFT CANNOT BE USED TO SATISFY A PERSONAL PLEDGE (E.G. A PLEDGE OF \$1,000 CANNOT BE SATISFIED BY \$500 FROM THE DONOR AND \$500 FROM PENN-AIR & HYDRAULICS CORP. MATCH).
3. GIFTS MAY BE MADE VIA CASH OR CHECK.
4. ELIGIBLE PENN-AIR & HYDRAULICS CORP. PARTICIPANTS WILL BE MATCHED UP TO \$500 IN EACH CALENDAR YEAR. THE MAXIMUM NUMBER OF GIFTS PER ASSOCIATE IS FIVE (5) PER CALENDAR YEAR, NOT TO EXCEED \$500 TOTAL.
5. GIFTS MADE WITHIN THE CALENDAR YEAR MUST BE REGISTERED BY THE CONTRIBUTOR BY THE 31<sup>ST</sup> OF DECEMBER. THE RECIPIENT ORGANIZATION OR INSTITUTION MUST CONFIRM RECEIPT OF A GIFT WITHIN 6 MONTHS OF THE DONOR REGISTERING THE GIFT.



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6. AS PART OF THE GIFT CRITERIA, THE ASSOCIATE MUST PROVIDE DOCUMENTATION DEMONSTRATING ACTIVE (NON-PAID) PARTICIPATION IN THE ELIGIBLE RECIPIENT ORGANIZATION. COMMUNITY SERVICE/VOLUNTEER TIME IS TO BE A MINIMUM OF TWO (2) HOURS PER GIFT PER CALENDAR YEAR. IT IS ENCOURAGED, BUT NOT ALWAYS REQUIRED TO ACTIVELY PARTICIPATE.

#### **B. INELIGIBLE GIFTS**

PENN-AIR & HYDRAULICS CORP. WILL NOT MATCH THE FOLLOWING:

1. CHARITABLE CONTRIBUTIONS MADE AS PART OF A UNITED WAY CAMPAIGN AND/OR MADE VIA PAYROLL DEDUCTION.
2. CHARITABLE CONTRIBUTIONS SUPPORTING ACTIVITIES FOR POLITICAL PURPOSES.
3. CHARITABLE CONTRIBUTIONS MADE AS BEQUESTS OR THROUGH ENTITIES SUCH AS CHARITABLE REMAINDER OR LEAD TRUSTS OR CHARITABLE GIFT ANNUITIES.
4. REAL ESTATE OR IN-KIND CHARITABLE CONTRIBUTIONS.
4. CONTRIBUTIONS, OR PORTIONS THEREOF, THAT ARE NOT TAX-DEDUCTIBLE.
5. CONTRIBUTIONS THAT ARE REQUIRED (E.G. TUITION OR REGISTRATION/PROGRAM FEES) OR THAT DIRECTLY BENEFIT THE PENN-AIR & HYDRAULICS CORP. CONTRIBUTOR (OR ANY MEMBER OF HIS/HER FAMILY).
6. "GROUP GIFTS" – EACH PENN-AIR & HYDRAULICS CORP. CONTRIBUTOR MUST REGISTER HIS/HER OWN CONTRIBUTION FOR MATCHING.

### **V. GIFT MATCHING PROCESS**

#### **A. REGISTER YOUR GIFT WITH PENN-AIR & HYDRAULICS CORP.**

PLEASE COMPLETE THE PAH MATCHING GIFTS APPLICATION ENCLOSED. QUESTIONS MAY BE DIRECTED TO PENN-AIR & HYDRAULICS CORP. AT (717) 840-8100 OR BY EMAIL TO [BRHEIN@PENNAIR.COM](mailto:BRHEIN@PENNAIR.COM).

#### **B. GIFT CONFIRMATION**

1. THE RECIPIENT ORGANIZATION/INSTITUTION MUST CONFIRM RECEIPT OF A GIFT WITHIN SIX (6) MONTHS OF THE DONOR REGISTERING THE GIFT. GIFTS AS REPORTED BY ELIGIBLE PENN-AIR & HYDRAULICS CORP. PARTICIPANTS ARE AVAILABLE IMMEDIATELY TO EACH RECIPIENT ORGANIZATION/INSTITUTION FOR REVIEW AND CONFIRMATION WITHIN THE MATCHING GIFTS APPLICATION. NOTE THAT THE RECIPIENT ORGANIZATION/INSTITUTION MUST ALSO CONFIRM COMPLIANCE WITH ELIGIBILITY CRITERIA.
2. ONCE CONFIRMED BY THE ORGANIZATION AND SUBSEQUENTLY APPROVED BY PENN-AIR & HYDRAULICS CORP., A GIFT WILL BE RECORDED AS ELIGIBLE FOR THE MATCH.



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**C. MATCHING GIFTS DISTRIBUTION**

1. PENN-AIR & HYDRAULICS CORP. MATCHING GIFTS CHECK WILL BE SENT DIRECTLY TO THE RECIPIENT ORGANIZATION OR CHARITABLE INSTITUTION.
2. PAYMENTS WILL BE MADE ON A MONTHLY BASIS UNLESS OTHERWISE NOTED.

**VI. ADMINISTRATIVE CONDITIONS**

PENN-AIR & HYDRAULICS CORP. MATCHING GIFTS PROGRAM IS NOT PART OF THE PENN-AIR & HYDRAULICS CORP. ASSOCIATE/RETIREE BENEFITS PROGRAM. IT IS RATHER OFFERED AS A SERVICE BY PENN-AIR & HYDRAULICS CORP.. PENN-AIR & HYDRAULICS CORP. DETERMINES ALL ASPECTS OF THE PROGRAM INCLUDING PARTICIPANT AND RECIPIENT ELIGIBILITY AND MAY AMEND OR TERMINATE THE PROGRAM AT ANY TIME.

# PAH matching gifts application

(Please Print)

**Part I:** (To be completed by the PAH Associate and forwarded to the designated 501(c)(3) organization. Please print a hard copy of this document and complete Part I in blue. After signing the application, mail this along with your check to the charitable organization receiving the contribution).

Date:	Work Email Address:	Work Telephone #:
Associate Name:	Personal Email Address:	Personal Telephone #:
Home Address:		
Organization Receiving Gift:		
Organization Telephone #:	Organization Address:	Organization Website:
Date of Contribution:	Contribution Amount:	Dollar Match Requested:
Please describe your relationship with the charitable organization and the amount of hours you have served in this calendar year:		
Associate Signature (I have read and understood the guidelines of the PAH Matching Gifts Program):		

**Part II:** (To be completed by the charitable organization receiving the contribution)

Please complete Part II and return the entire form along with a copy of the your organization's IRS 501 (c)(3) determination letter to:

Penn-Air & Hydraulics Corp.  
 Attn: Bob Rhein  
 1750 Industrial Highway  
 York, PA 17402

Name of Contributor:		
Date Received:	Contribution Amount:	
Payment Details (Check Number, Credit Card payment, etc...)		
Name of Charitable Organization:		Organization FEIN:
Address:		
Signature of Certifying Officer (I certify that the entire gift described above was received without any goods or services exchanged in return):		
Date:	Title:	Work Telephone Number:
Matching Gift Contact Name:		Work Email Address:

**Contact us:** Penn-Air & Hydraulics Corp. [Bob Rhein] @ (tel) 717.840.8100, (fax) 717.840.4321 or (email) [brhein@pennair.com](mailto:brhein@pennair.com)

