

## EDUCATION CONTRIBUTION MATCHING

\_\_\_\_\_  
Employee Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

Dear \_\_\_\_\_

USAA has established an Education Contribution Matching Program for its employees and retirees. The program is available to public or private schools (grades K-12), as well as college and university level educational institutions that have an exemption from federal income taxes and are appropriately accredited. USAA will match employee contributions dollar for dollar up to \$500 per year.

I am an employee (full time, part-time or retired) of USAA. Enclosed is my contribution of \$ \_\_\_\_\_. I am receiving no goods or services in exchange for this contribution. If you wish to participate in this matching program, please complete the attached form and return it along with a copy of my check or signed credit card slip to the following address:

USAA Community Affairs, D-3-E  
9800 Fredericksburg Road  
San Antonio, Texas 78288  
Attn: Tom Thurmond

Sincerely

\_\_\_\_\_  
Employee/Retiree Signature

**In order to use current year matching funds, all validated Education Contribution Matching Forms and required documentation must be received from the institution by December 1. All requests received after December 1 will be applied to the available match for the following year.**

USAA Community Affairs, D-3-E  
9800 Fredericksburg Rd.  
San Antonio, Texas 78288  
Attn: Tom Thurmond

We are requesting matching funds under the Education Contribution Matching Program.

EMPLOYEE'S INFORMATION:

EMPLOYEE NAME \_\_\_\_\_ AMOUNT OF CONTRIBUTION \_\_\_\_\_

EMPLOYEE NUMBER \_\_\_\_\_ Please circle appropriate category:  
Retiree  
Non-EMG EMG

INSTITUTION INFORMATION:

NAME AND ADDRESS OF INSTITUTION REQUESTING MATCHING CONTRIBUTION

\_\_\_\_\_  
NAME

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

PHONE (\_\_\_\_) \_\_\_\_\_ FAX # (\_\_\_\_) \_\_\_\_\_

TAX I.D. NUMBER \_\_\_\_\_ INSTITUTION ACCREDITED BY \_\_\_\_\_

Are you a qualified charitable organization as described in Section 170c of the Internal Revenue Code of 1986? \_\_\_\_\_

Has the donor received any goods or services in exchange for this contribution? \_\_\_\_\_ If yes, employee is not eligible for matching contributions.

NAME OF OFFICIAL REQUESTING THIS GRANT

\_\_\_\_\_  
NAME

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
SIGNATURE/DATE

*NOTE: To avoid processing delays, you must attach a copy of employee's check or signed credit card slip.*

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## EDUCATION CONTRIBUTION MATCHING

USAA has authorized a contribution matching program for all employees and retirees. The program will match contributions dollar for dollar up to \$500 per calendar year for all education levels, including grades K-12. Guidelines for use of the Education Contribution Matching funds are as follows.

- 1) An employee (or retiree) decides to make a contribution to a qualified educational institution.
- 2) USAA will match up to \$500 per employee per calendar year.
- 3) There is *no limit to the number of institutions* to which an employee (or retiree) may contribute.
- 4) USAA matches contributions to public or private schools (grades K-12), as well as colleges and universities that are regionally or nationally accredited.
- 5) Employees are responsible for sending their charitable contributions directly to the educational institution of their choice, along with the signed transmittal letter and the Education Contribution Matching form (see attached) with the employee's information completed.
- 6) The institution may obtain USAA's contribution by submitting the completed Contribution Matching Form with the copy of the employee's check or signed credit card slip to:

USAA Community Affairs, D-3-E  
9800 Fredericksburg Rd.  
San Antonio, Texas 78288  
Attn: Tom Thurmond

Matching funds will be sent by check directly to the institution. A complete record of contributions made by each employee will be maintained by The San Antonio Area Foundation. A letter signed by the President/CEO of The San Antonio Area Foundation will accompany the check and will recognize the employees for their contributions.

**To qualify for these matching funds, the contribution may NOT be made in exchange for activities, products, services, tuition or religious contributions and will be only matched under the name of a qualified educational institution.**

- 7) **In order to use current year matching funds, all validated Education Contribution Matching Forms and required documentation must be received from the institution by December 1. All requests received after December 1 will be applied to the available match for the following year.**

Questions concerning the administration of the matching funds may be referred to Tom Thurmond, 8-0929 or Barbara Gentry, 8-1225, Community Affairs, D-03-E.