

BMO Matching Gift Program

BMO matches charitable contributions made to qualified nonprofit organizations at a rate of \$.50 for every dollar contributed, up to maximum payments of \$1,000 per calendar year per person. Below is information on how the matching process works and how someone may [submit a request for matching](#). If you have any questions, you may contact our processing partner, United Way of Metro Chicago at help@liveunitedchicago.org or 312-906-2204.

Community Giving, along with its processing partner United Way of Metro Chicago, administers the Match Gift Program. BMO may suspend, revoke, amend or terminate the program at any time.

Who is eligible for the Match?

- US-based, regular full-time or part-time (min 20 hrs/wk) employee who has at least one year of employment.
- Retired US-based employee who is 55+ with 10+ years of service or 65+ with 3+ years of service.
- Members of the Bank's Board of Directors and Honorary Directors

What donations are eligible to be Matched?

- Donations are matched \$.50 per dollar, up to a max of \$1000 per calendar year per person.
- Donations of at least \$100 made to a certified 501(c)3 non-profit organization that is Patriot Act compliant may be submitted for matching.
- **ITEMS THAT WILL NOT BE MATCHED ARE:**
 - Payments of Insurance premiums, Tuition, Membership dues, Subscription fees, Conference expenses, or Service fees
 - Contributions to a Government entity, Fraternal organization, Elementary school, or Secondary school
 - Contributions made as part of a fundraising event such as walks, runs, bike rides, dinner events, auction, and program advertisements
 - Funds used to participate in raffles, lotteries, and other games of chance
 - Contributions to religious organizations unless they are for secular activities offered on a non-denominational basis
 - Contributions to organizations that employ discriminatory practices
 - Contributions made as part of the BMO Annual Employee Giving Campaign

How do I submit an application for the match?

- Use the [match request form](#) to submit the required data.
- Applications should be made for the calendar year the donation was made.
- All donations must be made no later than December 31st with all applications and supporting documentation being submitted no later than February 15th.
- Donor will be notified by email if there is a problem with the submitted information.

How quickly will the agency receive the match funds?

- Funds are processed on a quarterly basis with agencies receiving funds within 60 days of the close of the quarter.

How will the agency know that the funds are for the match of my contribution?

- Agencies have access to reports that will include donor names.
- Agencies may contact the United Way of Metro Chicago at agencyhelp@uw-mc.org if they have questions about provided reports and/or payments.