

# BOH BROS. CONSTRUCTION CO., L.L.C.

## Guidelines for the 2009 Educational Matching Gifts Program

### Eligible Donors

Any current full-time employee who, prior to the donation, has in the aggregate at least one year accredited service with Boh Bros., Boh Company, or Broadmoor.

### Eligible Educational Institutions

Primary schools, high schools, and higher education institutions are eligible. These include public and private primary and high schools; graduate and professional schools; four-year and two-year colleges; and technical institutes.

The institution must be located in the United States or one of its possessions, accredited by a nationally recognized regional or professional association, and recognized by the IRS as an education institution exempt from taxation under §501(c)(3) of the Internal Revenue Code of 1986, as amended, and classified as a public charity under §509, other than as a non-functionally related Type III supporting organization under §509(a)(3).

### Gifts that cannot be matched

Forms received more than one year after the date of the gift.

Payments for which the Donor, their family, or other individuals designated by the Donor receive a direct benefit. Examples include:

- Payments for services, tuition, books, or other student fees.
- Gifts to fulfill pledges, tithes, or other religious-related financial commitments or legal obligations, publication subscription fees, membership dues, or ticket purchases.
- Insurance premiums; bequests.

Gifts must be personal contributions from the Donor's own assets. Gifts are ineligible if the donation includes: gifts from spouses, other family members or contributions made jointly by several individuals.

Gifts to ineligible organizations. Examples include:

- Alumni associations, athletic associations, booster clubs, parent-teacher associations or organizations, etc.
- Contributions to individuals, fraternities or sororities.
- Gifts given to or through a third party.
- Gifts for non-scholastic purposes. The gift must support the primary educational mission of the institution. Dinners, events, athletics, athletic scholarships, marching band, stadium construction, or maintenance are typical ineligible gifts.
- Gifts must be charitable contributions, which can be deducted by the individual for federal income tax purposes, or which are qualified charitable distributions from IRA accounts under §1201 of the Pension Protection Act of 2006.

### Policies

The minimum gift is \$25. The aggregate limit is \$500 per employee donor per calendar year and the gift will be matched 1:1.

Only the portion of a gift for which no benefit is received can be matched. The value of items received by the donor, other than "token items," must be deducted from the amount to be matched. Examples of token items include bookmarks, calendars, key chains, mugs, posters, and T-shirts bearing the name of the educational institution.

### GIFTS MUST BE PAID, NOT MERELY PLEDGED.

Boh Bros. may suspend, amend or discontinue the Program at any time and reserves the right to determine whether any gift shall be matched. Gifts to be matched through this program must be made during the 2009 calendar year and submitted no later than February 28, 2010.

### Procedure for Matching Gifts

#### Donor Instructions

Read the Guidelines in full. Complete and sign the DONOR SECTION of the form.

If your gift was earmarked for a specific purpose (e.g., Scholarship Fund) note this on the *Restrictions or purpose* line. The Company's matching amount will be designated for the same purpose.

Mail the completed form with your check to the school or institute of higher education of your choice.

#### Educational Institution Instructions

Read the Guidelines in full. Complete and sign the EDUCATIONAL INSTITUTION section of the form. NOTE: ORIGINAL SIGNATURE IS REQUIRED. A stamped signature is not acceptable and the form will be returned.

Fill in the *Pay to* name with the payee's full name. This can be the educational institution name or the name of its foundation, as long as the foundation is not a non-functionally integrated Type III supporting organization under (Section) 509(a)(3).

Provide the name, telephone number, etc., for the person or office we should contact with questions concerning this match request.

Completing and signing the form certifies that you have read the *Guidelines*, that this is a qualified gift and that Boh Bros., Broadmoor, or Boh Company neither received nor expects to receive any benefit or quid pro quo.

If the Donor received a gift, subscription, tickets, or other tangible benefit (other than a "token item"), list the amount of the gift and the amount of the portion of the gift that exceeds the value of the benefit received. The Program only matches the portion of the gift for which no benefit is received.

Provide proof of your federal tax-exempt status with the initial matching request.

Mail all forms to the address shown below. Incorrect or incomplete forms will be returned for correction or completion.

Eligible donor contributions made during the 2009 calendar year will be paid on a quarterly basis. Please reference the chart below for program cut off dates and payment dates.

#### Forms Received by:

February 28, 2009  
May 31, 2009  
August 31, 2009  
November 30, 2009  
February 28, 2010

#### Matching Gifts Paid by:

March 31, 2009  
June 30, 2009  
September 30, 2009  
December 31, 2009  
March 31, 2010

Forms received more than one year after the date of the gift cannot be matched and will be rejected.

A list of the individual contributions and resulting matches is included with the payment.

#### Contact Information

If you have any questions about the educational matching gift program, your eligibility, the eligibility of the gift or institution or questions about a specific gift; please contact us by electronic mail, phone, fax, or US mail.

Stephen H. Boh  
P.O. Drawer 53266  
New Orleans, LA 70119  
(504) 821-2400 phone (504) 821-0714 fax

[sboh@bohbro.com](mailto:sboh@bohbro.com)

Completed matching gift forms cannot be faxed. Original signatures are required.

# BOH BROS. CONSTRUCTION CO., L.L.C.

## 2009 Educational Matching Gifts Program Form

### Donor Section

Donor last 4 digits SSN: \_\_\_\_\_

Donor Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

City: \_\_\_\_\_ State \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: (\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

- Donor Employer:
- Boh Bros.
  - Boh Company
  - Broadmoor

Donation to: \_\_\_\_\_

Date of Gift: \_\_\_\_\_

Amount of Gift: \$ \_\_\_\_\_

Restriction or Purpose \_\_\_\_\_  
(if any)

I request that Boh Bros. make a matching contribution on my behalf. I certify that this gift is solely for the use of the institution named and that neither I, nor any member of my family, nor any related third party, nor any party that I designate, will benefit in any way from this gift. I further certify that the amount given is entirely my own and meets the Guidelines for the Educational Matching Gifts Program set forth for the 2009 calendar year by Boh Bros..

Donor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Donor:**  
Please forward completed and signed form to the school or institution of higher education. Keep a copy for your records.

### Educational Institution Section

Federal Tax ID Number  
(EIN Number): \_\_\_\_\_

School Name: \_\_\_\_\_

Received a gift of \$ \_\_\_\_\_

from \_\_\_\_\_

of which \$ \_\_\_\_\_ is the tax deductible portion

By signing and presenting this form, I am certifying that I have read the Guidelines in full, the organization is a qualifying educational institution, and this gift complies with all terms, conditions, and restrictions within the Guidelines.

Name: \_\_\_\_\_

Title \_\_\_\_\_

Signature: \_\_\_\_\_  
(original signature required. Stamp not acceptable.)

Date: \_\_\_\_\_

Check Payable to \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

City: \_\_\_\_\_ State \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: (\_\_\_\_) \_\_\_\_\_

Fax: (\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

**Educational Institution:**  
Please return completed and signed form to:  
Stephen H. Boh  
Boh Bros. Construction Co., L.L.C.  
P.O. Drawer 53266  
New Orleans, LA 70153