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EQ Matched Giving – Terms & Conditions

Overview

This document is intended for clients and staff of EQ Investors to provide guidance to you on the conditions and terms under which EQ Investors Ltd offers to donate matched funding to a charity for whom you are undertaking a fundraising activity.

These terms and conditions do not represent a contractual arrangement, but instead are designed to inform you on this particular area of our corporate philanthropic activity and guide you through the application process. For further clarity on any aspect of these term and conditions please contact eqgiving@eqinvestors.co.uk

Please also see the **Frequently Asked Questions** (below) for further information.

Context

EQ Matched Giving is exclusively designed to support the philanthropic endeavours of EQ Investors clients and staff in raising funds for charity by matching the funds they raise pound for pound up to a maximum total donation of £1,000.

Please note: EQ Matched Giving does not represent a component of any product or service purchased from or supplied by EQ Investors. As such, the matching policy does not in any way impact on any existing contractual agreements between EQ Investors, its staff and clients.

Definitions

For the purposes of these terms and conditions the following terms shall have the following meanings:

“EQ Investors” – EQ Investors Holdings Ltd, whose principal address is Centennium House, 100 Lower Thames Street, London EC3R 6DL, United Kingdom and its subsidiary companies.

“EQ Client” – a client with an ongoing fee agreement with EQ Investors that has been in existence for at least six months.

“EQ Staff” – a person employed by EQ Investors.

“Nominated Charity” – the charity for which the EQ client or staff is raising money.

“Matched Donation” – the maximum sum of £1,000 to be paid to the Nominated Charity as match funding in one instalment in accordance with these term and conditions.

“Match funding” – in the context of these terms and conditions, matching is defined as a financial commitment from EQ Investors to donate £1 for every £1 raised by EQ clients and staff for a Nominated Charity through a specific fundraising activity, up to a limit of £1,000.

“Qualifying bodies” – charities that under this agreement qualify for match funding by meeting the basic criteria outlined in section 2.

“Qualifying activities” – fundraising activities undertaken by EQ Investor clients that are eligible for match funding provision.

1. The commitment

EQ Investors, on due satisfaction of the criteria outlined below, agrees to pay a charitable donation of up to £1,000 to a Nominated Charity to assist that charity in carrying out its core charitable activities.

Only the total of monies raised in support of the Nominated Charity are eligible and not any additional sums raised through other means such as Gift Aid can be included.

EQ Investors will make matched donations directly to the qualifying charity, either through a cheque or transfer to the charity or through making a gift directly onto the relevant third party fundraising webpage, such as through JustGiving or Virgin Money Giving. The means by which the transfer of agreed funds is made is at the discretion of EQ Investors.

All applications must be received within four weeks of the scheduled fundraising event being completed. Events that occurred in the past are not eligible for support.

In order for a donation to be made, the following criteria (expanded below) must be met;

- (A) The Nominated Charity must comply with the qualifying body criteria (see section 2)
- (B) The fundraising activity must comply with the qualifying activities criteria (see section 3)
- (C) A Matched Giving form must be completed and submitted to eggiving@eqinvestors.co.uk, along with the most recent report and accounts for any charities that have a turnover of less than £10 million
- (D) The match donation must be approved through the approval process (see section 4).

Please note: There is a finite sum available in any calendar year for this activity and so EQ Investors reserves the right not to match donations once that limit has been reached. EQ Investors reserve the right to amend or withdraw this offer without notice.

2. Qualifying bodies and activities

In order to be eligible for match funding the client's charity of choice must be registered and formally recognised by one of the following bodies or meet the following criteria:

- Charity Commission for England and Wales (CCEW)
- Office of Scottish Charities Regulator (OSCR)
- The Charity Commission for Northern Ireland (CCNI)
- Charities which are either exempt (i.e. Higher Education Institutions) or exempted (i.e. charities that currently do not need to register such as Boy Scout and Girl Guide charities and some armed forces charities)
- Bodies which are recognised by HMRC as charitable for tax purposes i.e. charities with income below £5,000 and so do not need to register with the Charity Commission
- Social enterprises – businesses that trade for a social and/or environmental purpose. Please visit the Social Enterprise UK website for information: www.socialenterprise.org.uk

Non-qualifying bodies

EQ Matched Giving is not available to charities which fall under any of the following broad activities:

- Political parties and affiliated groups
- Causes that overtly benefit a single religious group¹
- Privately funded educational organisations which are not a UK registered charity or which exist for the exclusive benefit of fee paying students
- Organisations which contravene any law.

In addition, EQ Investors will not make any matched donations to charitable organisations that:

- Have failed to submit the reports and accounts (where applicable) within the required timeframes, as set by the relevant national regulator
- Are the subject of an ongoing investigation from the Charity Commission (or comparable national body).

Above and beyond the criteria above, EQ Investors retains the right to refuse any requests if there is a perceived risk of association with a charity or associated organisation.

Qualifying activities

In order to be eligible for match funding the fundraising activity undertaken must comply with the following criteria:

- The activity must not present the potential to bring EQ Investors name or professional reputation into disrepute
- The activity must not involve excessive risk of injury or death to EQ Investors clients, staff, other participants or members of the public
- The fundraising activity must comply with all relevant UK and international law.

¹ It is understood that many UK charities have religious affiliations, foundations and history. The restrictions on single faith religious organisations only applies to charities where the promotion of any one faith is the primary purpose of that organisation or that observance to a specific faith is a prerequisite of support.

3. Application process

You must submit an [EQ Matched Giving application form](#) in advance of the event, telling us:

- The date and name of the event
- The name of the charity and its registered number
- A copy of its most recent filed accounts (if annual revenue is less than £10 million)
- 100-200 words on why you think this is a good cause to support
- Send to: eggiving@eqinvestors.co.uk

Decisions on any match funding donation are taken by an appointed Community Committee. Final approval on match donations following approval from the Charity Committee lies with the CEO of EQ Investors. The decision of the EQ Investors Charity Committee and CEO is final and without appeal.

Frequently Asked Questions

My partner, husband, wife or child is taking part in a sponsored event, can I apply on their behalf?

Sadly, due to the number of requests we expect to receive, the match is only available to an EQ client or EQ staff member directly and not to wider members of their immediate or extended family or friends.

I am taking part in a sponsored event as part of a team, can I apply for matching for the amount raised by the team?

The matched funding applies only to fundraising by an individual EQ client or member of staff; if you are participating as part of a team you will need to evidence individual fund raising, for example by having your own Just Giving page.

I'm taking part in an overseas challenge and need to pay a deposit to participate, can I apply for support with the deposit?

While your fundraising efforts would qualify, if they are in support of a qualifying charity and the activity complies with the overall policy, any deposit could not be met by support from EQ Investors.

I'm not taking part in a sponsored event, but want to make a one-off donation to my chosen charity, is that eligible for matching?

The policy is intended to support the many fundraising activities undertaken by EQ Investors clients, to help you leverage further support from your friends and family and not to match the generous support you might give through one-off or regular donations to charity.

I've been a client for many years, can I apply for multiples of £1,000 as I have not claimed this allowance before?

The policy was introduced in 2014 when EQ Investors Ltd was launched. Each client is eligible for a potential maximum matched donation of £1,000 per calendar year and cannot accrue donations. The donation is freely given by EQ Investors and is not an 'allowance' in any way linked to EQ Investors products or services.

My child attends a private school where I pay fees, can I apply for matching to cover part of their tuition costs?

Donations to fund tuition fees are not eligible.

My local (church, mosque, synagogue or other place of worship) undertakes an outreach programme targeting vulnerable homeless people near to where we live, this service is open to anyone in need of help regardless of their faith. Is my fundraising eligible for matching even though the charity is a (church, mosque, synagogue or other place of worship)?

Yes, given the community programme is offered to any vulnerable individual regardless of any faith, the fundraising could be eligible for match (assuming other relevant factors comply).

I have raised £500 by running the London Marathon for Oxfam and this has become £600 when GiftAid is included. What match am I eligible for?

Your fundraising total of £500 would potentially be eligible for matching and not the enlarged sum including Gift Aid. EQ Investors Ltd will match the sum, net of GiftAid up to £1,000 in any calendar year.

Will any donation from EQ Investors be eligible for GiftAid?

No, donations from companies are not eligible. For further information on Gift Aid please see <http://www.hmrc.gov.uk/individuals/giving/gift-aid.htm>

I'm taking part in a sponsored walk with the funds split between three local charities, how would EQ Matched Giving be allocated?

Any eligible matching from EQ Investors would be split equally between the causes.

I need to raise £3,000 in advance of a sponsored cycling challenge for Macmillan Cancer Relief in China. I must evidence I have raised the minimum of £3,000 before I leave. Can I apply for match funding in advance of completing my fundraising challenge?

Yes, if the charity / activity is eligible you can apply for the matching in good faith that you will complete the challenge within a defined time period.

I took part in a sponsored walk for CRUK last summer and my JustGiving page is still live, although the event has long past. Can I still apply for matched funds from EQ Investors?

No, due to the many expected requests for support, we are only able to consider activities exclusively in the future and all applications must be received within four weeks after the scheduled event.