

## **CRITERIA FOR CHARITABLE DONATION APPLICATION SUBMISSION**

The following items are required as part of the Carl Zeiss Meditec (CZMI) charitable donation application process and should be prepared prior to submission:

**(1) Donation Request on Letterhead of requesting organization and to include the following:**

- a. A brief description of your organization, its goals, and programs
- b. Relationship to receiving organization: (Describe nature of your relationship and note specifically if you are on the Committee, receive compensation from, or have an investment interest in the receiving organization.)
- c. Description of how the contribution will be used

**(2) Needs Assessment**

- a. State why a donation is important to meeting the organization's primary goals and objectives

**(3) If the organization is an IRS tax-exempt entity (U.S.)**

- a. Documentation of organization's valid tax-exempt status (e.g., the IRS determination letter)

**(4) Current IRS issued W-9 form or Certificate of Residency if out of the U.S.**

**(5) Copy of organization's Mission Statement & Bylaws**

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Carl Zeiss Meditec, Inc. (CZMI) may provide charitable donations where the proceeds are intended for:

- (1) Legitimate and independent medical research for the advancement of medical science or education relating to vision.
- (2) Indigent care.
- (3) Patient and public education relating to vision.

CZMI will not make any cash or non-cash donations to any organization for the purpose of developing, furthering, or maintaining a specific account relationship. In addition, the following areas fall outside of CZMI's areas of giving:

- (1) An individual HCP, person or family.
- (2) Consultants, advisors, or any others who furnish professional services to CZMI.
- (3) Religious organizations.
- (4) Political parties.
- (5) Endowment or memorial funds.
- (6) Multi-year pledges.