

Matching Gift Program for Higher Education

The Program

The Guardian Life Insurance Company of America's (Guardian) matching gift program is designed to encourage and supplement financial support for institutions of higher education by its employees and field associates.

Annual Limits

Guardian will match gifts of \$25 or more, based on the following annual limits:

- \$5,000 – Executive Vice Presidents, Senior Vice Presidents, Vice Presidents, and the Board of Directors
- \$2,500 – Full-time employees in the home office, regional home offices, and regional group offices
- \$1,000 – Financial Representatives
- Retirees' gifts will be matched at the level the individual qualified for at retirement date

Restrictions

The Company will *not* match:

- Gifts for non-scholastic programs (e.g., athletic programs, athletic funds, booster clubs, fraternities, or sororities)
- Gifts for services, tuition, alumni or class dues, subscription charges, memberships, tickets, or any other personal benefit
- Funds designated to benefit an individual
- Bequests or pledges

Eligible Participants

- Full-time employees of Guardian, General Agents, Career Development Managers, Field Representatives, and Elite Producers who have completed at least one year of continuous service
- Members of Guardian's Board of Directors
- Retired eligible participants
- Spouses/domestic partners of eligible participants (gifts count toward participant's maximum match)

Eligible Schools

Public or private colleges, universities, graduate, and professional schools located in the United States that are listed in the *hep*™ Higher Education Directory and accredited by a nationally recognized regional accrediting association are eligible. The school must also have a nonsectarian accreditation and be classified by the Internal Revenue Service as a tax-exempt organization, under Section 501(c)(3), to which contributions are deductible for federal income tax purposes.

Contributions to The American College are also eligible.

Eligible Gifts

Gifts must be made to an eligible school, or its foundation, which will use all funds received for the benefit of that single school. Any number of gifts may be contributed to any number of eligible schools, provided that each individual gift is at least \$25 and the total of all gifts does not exceed the annual limit. Participants' gifts may be restricted or unrestricted. All gifts made by Guardian will be unrestricted.

Gifts must be made from the personal funds of the participant, including securities. Securities will be valued at their quoted selling price at the close of trading on the date of the gift. Evidence of the value of the securities must be provided with the application.

Premium payments on Guardian insurance policies will be matched only if the insured is an eligible participant, the owner and irrevocable beneficiary of the policy is an eligible school, and if all other program rules and procedures are followed. The *full* annual premium must be paid by the participant prior to any match by Guardian.

Steps for Obtaining a Match

- The donor completes **Part 1**, signs and sends it to the eligible school.
- An authorized designee of the school completes **Part 2**; certifying receipt of the gift and the eligibility of the school prior to returning the application to Guardian.
- Guardian's Corporate Philanthropy office verifies eligibility of the participant and the school, approves the application, and arranges for payment of Guardian's match.
- Matched gifts will be paid directly to the school. Confirmation of the payment will also be furnished to the donor.

Guardian reserves the right to alter, suspend, revoke, or discontinue this program without notice; decide any question of its interpretation, application, and administration; and restrict the total of gifts matched in any one year to an amount authorized by Guardian's management.

Continued

THE GUARDIAN LIFE INSURANCE COMPANY OF AMERICA
Matching Gift Program For Higher Education

Office Use:

Donor Eligibility	
School Eligibility	
Previous 201 ___ Match	
Approval	

PART I – DONOR *Complete and furnish to eligible school*

Name* _____
 (PLEASE PRINT)

Address _____

* If the Donor is the spouse/domestic partner, provide Guardian associate's name: _____

First-Time Participant? ___ No ___ Yes If yes, provide employment date: _____

Employee's Location: ___ New York ___ Appleton ___ Bethlehem ___ Innovative Underwriters ___ Pittsfield ___ Premier Access
 ___ Spokane ___ Regional Group Office

Field Associate: ___ General Agent ___ Field Representative ___ Elite Producer

Retiree: ___ Employee ___ Field Associate

I enclose my gift of \$ _____ Amount of gift to be matched: \$ _____ Date of gift: _____

Gift made by: Check or Credit Card
 Donation of Securities (evidence of value must be provided)
 Guardian Policy Premium Payment, Policy Number _____
 (Only if school is beneficiary)

Recipient School _____

Use of Donor's Gift Unrestricted _____
 Designation _____
 (Must be for scholastic purposes)

I certify that neither I nor my family will derive any direct or indirect financial or material benefit from this contribution. I further certify that this contribution does not represent payment for tuition, services, or other personal financial obligations. I have read and understand the Program guidelines as described herein.

Signature _____ Date _____

PART 2 – RECIPIENT SCHOOL *Complete and return to Guardian*

I certify that I have read and understood the Matching Gift Program guidelines as described herein, and that the gift made meets all eligibility requirements and qualifies for a Guardian match.

I further certify that the above donor's gift of \$ _____ was received on _____

School _____

Address _____

Signature _____ Title _____

Telephone _____ Email _____ Date _____

AFTER COMPLETION OF PART 2, RETURN TO:

Corporate Philanthropy The Guardian Life Insurance Company of America, 7 Hanover Square, 27G, New York, NY 10004
Inquiries may be directed to Karen Olvany at (212) 598-7499 or karen_olvany@glic.com.

