

# Matching Gifts Form

**Please review program details on page 2 before completing this form.**

Complete PART A and send both pages of this form with your donation to the organization receiving your contribution

**PART A**

(to be completed by eligible AXA person)

\_\_\_\_\_  
Name

\_\_\_\_\_  
Business Address (include region)

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

\_\_\_\_\_  
Office Phone Number

\_\_\_\_\_  
Employee Number/Financial Professional Code

**AXA Relationship** (check one)

- Employee
- Financial Professional (Production Club member)
- Field Manager
- Board Member

**Gift is -- REQUIRED FIELDS**

Amount of Gift \$ \_\_\_\_\_ (minimum of \$50)  
Amount you are requesting be matched, if  
different from the amount of the gift \$ \_\_\_\_\_

Date of Gift \_\_\_/\_\_\_/\_\_\_

Unrestricted  Restricted to: \_\_\_\_\_

AXA Disaster Relief Matching Gift:  
\$ \_\_\_\_\_ in support of \_\_\_\_\_  
(specify the disaster)

**Form of Gift Payment** (check one)

- Cash, Check, Money Order, Credit Card
- Bonds or Shares of \_\_\_\_\_
- Life Insurance Premium

Note: No other forms of gifts are allowed.

I hereby certify that the above donation is entirely my personal contribution, and is not in whole or in part the gift of another individual or the sum of the gifts of other individuals. I also certify that all information is accurate, that contributions are not in lieu of tuition, fees, or other personal obligations, that I have not received any material personal benefit in exchange for the gift, and that I have not been reimbursed by any party. In addition, I certify that I have read and understand and am in compliance with the guidelines of the AXA Foundation's Matching Gifts program. NOTE: The AXA Foundation reserves the right to obtain a copy of your paid check before or after the Matching Gift is made.

\_\_\_\_\_  
*Signature of Contributor*

- To be eligible for matching, your contribution must be acknowledged by the organization and the form received by the AXA Foundation not later than February 28 following the year in which the gift was made.
- Prior year forms received after February 28 will not be matched.

**PART B**

(to be completed by an authorized officer of the recipient organization)

I hereby verify receipt of the above-stated contribution for the above individual and certify that the donation represents a charitable contribution for which the donor received no goods or services (i.e., tuition, dues credit, tickets, food/entertainment expenses, etc.) as determined for Federal income tax purposes. To the best of my knowledge, this gift is not, in whole or in part, the gift of another individual or the sum of gifts of other individuals, nor was it made to satisfy a legally binding pledge.

\_\_\_\_\_  
Official Name of Organization Receiving this Gift  
(do not use abbreviations or acronyms)

\_\_\_\_\_  
Address of Organization

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

\_\_\_\_\_  
Office Phone Number Tax I.D. Number

\_\_\_\_\_  
*Signature of Certifying Officer*

\_\_\_\_\_  
Name of Certifying Officer (print)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Amount of Gift Received \$

\_\_\_\_\_  
Tax Deductible Amount \$

\_\_\_\_\_  
Date Gift Received \_\_\_/\_\_\_/\_\_\_

**Organization Category** (check the most appropriate category)

Organization supports and/or seeks to reduce risk in the following area:

- |   |  |
|---|--|
| <input type="checkbox"/> Animal Welfare     | <input type="checkbox"/> Financial         |
| <input type="checkbox"/> Arts/Culture       | <input type="checkbox"/> Health/Safety     |
| <input type="checkbox"/> Community services | <input type="checkbox"/> LGBT              |
| <input type="checkbox"/> Disabled           | <input type="checkbox"/> Veterans/Military |
| <input type="checkbox"/> Education          | <input type="checkbox"/> Women             |
| <input type="checkbox"/> Environmental      | <input type="checkbox"/> Other _____       |
- (specify)

**Completed forms must be scanned and emailed to:**

[matching.gifts@axa.us.com](mailto:matching.gifts@axa.us.com)

or mail to: AXA Foundation  
Matching Gifts  
1290 Avenue of the Americas  
New York, NY 10104

Matches are processed after recipient organizations submit completed Matching Gift forms to the AXA Foundation. Qualifying matches are mailed the month after the AXA Foundation receives the completed form.

# AXA Foundation Matching Gifts Form

The Matching Gifts Program is an important resource for employees and financial professionals. It is designed to help you magnify the impact of your own giving, to leverage your community activities, and to be used as part of your branch-sponsored community projects.

Through the Matching Gifts Program, you are encouraged to contribute personally to nonprofit organizations - - and when you give, the AXA Foundation will give on your behalf.

## Who Is Eligible?

- Current full-time and part-time Group I employees of AXA Equitable, AXA Advisors and AXA Tech, with at least six months of continuous service at the time of the gift
- Current or retired AXA financial professionals who are either current Production Club members at the time of the gift or who were members as of December 31 of the year prior to the year in which the gift is made
- All active Field managers
- Current members of the board of directors

## Which Organizations Are Eligible?

The AXA Foundation will match donations to most nonprofit, tax-exempt 501(c)(3) organizations that are public charities.

## Which Organizations Are Not Eligible?

- Colleges and universities that are not recognized by one of the six accrediting associations
- Private foundations
- Health care facilities that are not accredited general hospitals or hospices
- Religious organizations (unless the gifts are designated to an ongoing secular community services program sponsored by these organizations); political organizations; fraternal, professional, and social groups
- Organizations whose activities do not focus predominantly on the United States and its territories (see AXA Disaster Relief Matching Gifts, below)

## What Are The Terms Of The Program?

- The AXA Foundation will match all eligible gifts dollar-for-dollar
- The donation must be made entirely from the personal funds of the AXA employee or financial professional whose signature is on the form, and not in whole or in part from any other individual within or outside the company
- The minimum amount that will be matched is \$50 per individual
- The annual maximum amount that will be matched is \$2,000 per individual
- The \$2,000 maximum may be divided among eligible organizations or given to a single organization
- If the gifts exceed the maximum in any year, carry-over into succeeding years will not be permitted
- The AXA Foundation completes all due diligence to ensure receipt and acceptance of matching contributions

When there is any question about a gift's eligibility, the determination of the AXA Foundation will be final.

### AXA Disaster Relief Matching Gifts

- Supplemental to the standard Matching Gifts program.
- The AXA Foundation must designate the disaster as eligible.
- All standard Matching Gifts program regulations apply, except:
  - The annual amount that will be matched is \$1,000 per individual. [This is in addition to the \$2,000 standard program maximum.]
  - Contributions to relief efforts outside the United States may be matched if the contribution is to a U.S.-based organization participating in the recovery effort.
- **Deadline:**
  - Effective January 1, 2014, only contributions that are made within one year of the disaster are eligible for matching through the Disaster Relief program.
  - After the one year deadline, contributions may be eligible for matches through the standard Matching Gifts program, if they meet standard program regulations.
  - Eligible disasters that occurred prior to 2014 remain eligible for matches; however they will be made through the standard Matching Gifts program.

## What Types Of Gifts Are Eligible?

- Cash, check, money order or credit card
- Securities with a quoted market value determined by the published bid price on the day the gift is made, or by the proceeds from sale by the recipient prior to submission of the Matching Gifts form. (The AXA Foundation match cannot constitute a portion of the securities payment.)
- Premiums on insurance policies of which the qualifying organization is an owner and beneficiary. Appropriate documents must be enclosed with the first such payment. (The AXA Foundation match cannot constitute a portion of the premium payment.)

## What Types Of Gifts Are Not Eligible?

- Testamentary bequests
- Dues and subscription fees
- Tuition fees, loan repayments and payments in lieu of tuition
- Gifts to individuals or grouped and pooled donations, including donor advised funds
- Gifts in exchange for which the donor receives material benefit, or which are made to satisfy a legally binding pledge
- Any portion of a contribution that covers expenses for benefit dinners, golf tournaments, etc., because those benefits do not qualify as charitable donations under Federal income tax law
- Any gift which, in the opinion of the AXA Foundation, is not deductible by the donor for Federal income tax purposes

## How To Participate

- The donor must complete Part A on the other side of this form. Please be sure that it is filled out completely; failure to do so delays processing of the match
- Specify if you want your gift to be Restricted or Unrestricted. For Restricted Gifts, please indicate to which specific area or program of the organization you want your gift allocated. Unrestricted Gifts are allocated at the discretion of the organization
- Mail the form and your contribution to the organization you have selected
- The recipient organization must complete Part B of the form and return the entire form to the AXA Foundation
- To be eligible for matching, your contribution must be acknowledged by the organization and the form received by the AXA Foundation no later than February 28 following the year in which the gift was made
- Prior year forms received after February 28 will not be matched

## How To Get More Forms And Information

- Matching Gift forms are available on ONE and eDOX
- Questions should be emailed to [matching.gifts@axa.us.com](mailto:matching.gifts@axa.us.com).
- **Completed forms must be scanned and emailed to:**

[matching.gifts@axa.us.com](mailto:matching.gifts@axa.us.com)

or mail to AXA Foundation, Matching Gifts, 1290 Avenue of the Americas, New York, NY 10104

- The AXA Foundation reserves the right to discontinue or to amend the provisions of the program at any time without prior notice. The administration, interpretation and application of the provisions of the program are entirely within the discretion of the AXA Foundation, and all decisions will be final