



FOUNDATION™

http://www.aetna.com/foundation

PART A – DONOR SECTION

Please complete Part A and forward this entire form to the Recipient Organization. Recipient Organization will complete Part B.

Donor Identifier
_____ Aetna Identification Number (for employees only)
____/____/____ Social Security Number (for retirees only)
Donor Status (Select one) <input type="checkbox"/> Employee <input type="checkbox"/> Employee Spouse/Domestic Partner <input type="checkbox"/> Retiree <input type="checkbox"/> Retiree Spouse/Domestic Partner <input type="checkbox"/> Aetna Director <input type="checkbox"/> Aetna Director Spouse/Domestic Partner
Donor Name
Home Address
City/State/Zip
Phone
E-mail Address
Date of Gift
Amount of Gift
Type of Gift (Select one) <input type="checkbox"/> Cash/Check <input type="checkbox"/> Credit Card <input type="checkbox"/> Securities
<u>If Securities</u>
Name if Security
Number of Shares
Date of Transfer
Recipient Organization Name
City/State
Program Designation (if any)

Certification Statement: I hereby certify that the information I have provided is complete and correct, that my gift hereby complies with the program provisions stated on this form, and that my gift is not to be used for the international or sectarian purposes. I understand that only the tax-deductible portion of my donation is eligible for matching by the Aetna Foundation Matching Gifts Program.

Donor Signature
Date

PART B – RECIPIENT ORGANIZATION

Please complete the following information and send to:

Aetna Foundation, Inc.
Matching Gifts
P.O. Box 7337
Princeton, NJ 08543-7337

EIN#
Organization Name
Organization Mailing Address
City/State/Zip
Phone
Fax
E-mail Address
Web Site Address
Gift Amount
Tax-Deductible Gift Amount

Certification Statement: I hereby certify that the receipt of the gift described herein, the eligibility of this organization, and that the use of these funds will support the primary aims of this organization. I attest that they will not be used to pay any fees or in lieu of tuition

Name of Organization Representative
Title
Signature
Date

AETNA FOUNDATION, INC.

**PARTNERS IN
COMMUNITY GIVING®**



MATCHING GIFTS

Partners in Community Giving is the Aetna Foundation's program to encourage employees and other eligible individuals to support nonprofit charitable organizations.

AETNA FOUNDATION, INC., PARTNERS IN COMMUNITY GIVING is a registered service mark of Aetna Foundation, Inc.

* The Aetna Foundation, Inc. reserves the right to modify or discontinue this program at any time. The interpretation, application and administration of the provisions of this program shall be determined solely by the Foundation, and its decisions shall be final.

Partners in Community Giving has two components: Matching Gifts and Aetna Volunteers! Both programs are administered through the new **Aetna Foundation Easymatch Program web site**. This web site is an online system for requesting a matching gift from the Aetna Foundation to your chosen recipient organization. Participants also may elect to use the application form on the reverse side of this brochure to request a matching gift.

Matching Gifts matches personal donations for eligible Aetna participants to all eligible educational institutions and tax-exempt charitable groups, except religious organizations.

ELIGIBLE PARTICIPANTS

- **Matching Gifts:** Full-time and part-time regular Aetna employees, directors, retirees, selected agents who meet performance qualification criteria and spouses/domestic partners.

ELIGIBLE ORGANIZATIONS

Eligible organizations must be either: located in the U.S. or one of its possessions, and be recognized by the Internal Revenue Service as tax exempt and designated a public charity under 501(c)(3) of the IRS Code or as an instrumentality of a federal, state or local government as provided by Section 170(c)(1) of the Code; or located in Canada and have an established method of receiving gifts in the United States.

INELIGIBLE ORGANIZATIONS

Ineligible organizations include the following:

- Political concerns;
- Religious organizations, unless the specific program is nondenominational in nature and benefits a broad range of the community (e.g., soup kitchen, homeless shelter); and
- Organizations representing conflicts of interest for the applicant or for the Foundation.

GUIDELINES

Matching Gifts:

- Minimum amount matched is \$25.
- An aggregate limit of \$5,000 per eligible participant *and* his or her spouse/domestic partner will be matched per year.
- The \$5,000 limit applies to the program year (January 1 – December 31). The program year the gift is applied to is determined by the date the gift is made.
- Gifts will be matched at 100% up to the program's yearly limit. Prorated adjustments in the matching amounts awarded to eligible organizations will be made if overall participant demand exceeds the annual program budget.
- No limit on the number or dollar amount of Matching Gifts an organization may receive from eligible participants.
- Matching Gifts are unrestricted as to purpose, although participants may designate their eligible gifts to specific programs.

- Gifts must be an actual contribution, *not merely pledged*, paid by check, cash, credit card or publicly traded securities from personal funds.
- The Foundation *does not* match bequests, dues, subscription fees, tuition or student fees; or gifts that are not made as direct contributions to eligible nonprofit organizations.
- Participants may *not* receive goods, services or benefits in return for their own or the Foundation's donations.
- Matching Gifts requests must be submitted within one year from the date of the gift.

GRANT PAYMENTS

Matching Gifts are paid annually. Our program runs from January 1 through December 31. Eligible gift requests received and/or confirmed by December 10 will be paid by December 31. Eligible gift requests received and/or confirmed after December 10 will be included with the next Matching Gifts annual payment.

If prorated adjustments are applied, the Matching Gift amounts may vary in each payout due to the volume of eligible requests.

INFORMATION

For more information, please contact:

Aetna Foundation, Inc.

Matching Gifts

P.O. Box 7337

Princeton, NJ 08543-7337

Phone: 1-888-261-8653

Fax: 1-609-799-8019

E-mail: aetna@easymatch.com

Web site address: www.easymatch.com/aetna