



Tue., Apr. 17, 2007

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Matching Gifts Program Guidelines

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What is the Matching Gift program?

The Matching Gift program allows employees and other eligible individuals who make monetary gifts to nonprofit organizations to apply for Aetna Foundation grants to as much as double their gifts. There are two types of Matching Gift grants:

Disaster Relief

Aetna's disaster relief grants go to the organizations that the Aetna Foundation's grantmaking process identified as best suited to provide short- and/or long-term relief and reconstruction for that disaster at the time the Disaster Relief Grants are issued. These organizations may or may not include the organization to which the employee gave.

General

In cases where the individual is not giving for disaster relief, Aetna will contribute its grant to the same organization to which the employee gave.

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Who can apply?

Full- and part-time regular Aetna employees, retirees, directors, selected agents, and spouses/domestic partners of all of the above are eligible.

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What gifts are eligible?

- Gifts must be an actual contribution (not merely pledged) paid by check, cash, credit card, or publicly traded securities* from personal funds.
- The minimum eligible gift is \$25.
- Employees, retirees, directors, and their spouses/domestic partners can submit annually up to \$5,000 in gifts that are not designated as disaster relief, and up to \$5,000 in gifts that are designated as disaster relief, totaling \$10,000 per person per program year. Selected agents and their spouses/domestic partners can submit annually up to \$2,500 in gifts that are not designated as disaster relief and up to \$2,500 for gifts that are designated as disaster relief, totaling \$5,000 per person per program year. The program year runs from December 11th till December 10th of the following year.
- Gifts to fundraising events like walk-a-thons are eligible as long as they are personal contributions by eligible participants, not pooled funds provided by individuals or groups. The Aetna Foundation will match gifts to charitable gift funds or donor-advised funds as long as the fund is a public charity as described in Section 501(c)(3) of the Internal Revenue Code. It will not match the amount of any grant by the fund to a third-party charitable organization.
- Gifts are eligible for disaster relief grants if the individual's gift is directed toward a disaster, where a disaster is defined as a significant incident such as a flood, high water, wind-driven water, earthquake, volcanic eruption, drought, blizzard, pestilence, famine, fire, explosion, building collapse, transportation accident, or other situation anywhere in the world that, for hundreds of victims, causes human suffering and generates basic human needs that cannot be alleviated without assistance.

*Valued at the closing price on the day the gift is made.

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What gifts are not eligible?

- Gifts for political concerns
- Gifts for religious organizations, unless the specific program is nondenominational in nature and benefits a broad range of the community (e.g., soup kitchen, homeless shelter, etc.)
- Gifts to organizations representing a conflict of interest for the applicant of the Foundation
- In-kind gifts, life income trusts, or real estate
- Bequests, dues, subscriptions fees, tuition, student fees, insurance premium payments, or gifts that are not made as a direct contribution to eligible nonprofit organizations
- Pledges, third-party, or pooled gifts
- Gifts distributed from a charitable trust fund, foundation, or corporation
- Gifts to private foundations
- Gifts entitling the giver to some personal benefit (goods, services, etc.) in return for their own or the Foundation's donations

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How many gifts can I make?

Individuals can make as many eligible gifts to as many eligible organizations as they would like, up to the total annual limit.

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Which institutions are eligible?

Organizations must be located in the United States or one of its possessions, be recognized as tax-exempt, and be designated a public charity under Section 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 and cannot be one of the following:

- Organizations furthering political aims
- Religious organizations, unless the recipient program is nondenominational in nature and benefits a broad range of the community; for example, a soup kitchen or homeless shelter
- Organizations that represent a conflict of interest for the applicant or the Aetna Foundation
- Organizations that entitle the giver to some personal benefit (goods, services, etc.) in return for their volunteer service or the Foundation's donations
- Private foundations

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Can my matching gift grant be designated?

Disaster Relief

Disaster relief grants cannot be designated beyond the designation of a specific disaster.

General

Grants for gifts that are not for disaster relief can be designated to support a specific program as long as it supports the organization's mission and, for faith-based organizations, it is for nondenominational services that benefit a broad range of the community.

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How much of my gift is matched?

Disaster Relief

For disaster relief grants, the Foundation's contribution is the same amount as the individual's gift, so long as the gift is for a need that meets the definition of disaster, per these guidelines. However, the Foundation reserves the right to change the amount of its contribution at any time to respond to budgetary or other constraints.

General

For gifts that are not disaster relief, the Foundation adjusts the amount of its contribution per the annual program budget. Recent percentages are shown below.

Program Year	Prorated Payout Percentage
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2006	50%
2005	50%
2004	50%
2003	50%
2002	80%
2001	100%
2000	74%
1999	100%
1998	100%
1997	100%

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Is there a limit on the amount of matching gift grants an organization may receive in a year?

There is no limit on the number or the dollar amount of matching gift grants an organization may receive from eligible participants.

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How do I participate?

Individuals can request a matching gift grant on this site by clicking on the “new request” link or by downloading a form through the [“download form”](#) link.

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When are matching gift grants paid?

Disaster Relief Gifts

Disaster relief grants are subject Aetna Foundation nonprofit organization selection procedures to select the recipient organization and are, therefore, not subject to a schedule but are paid as soon as practical.

General Purpose Gifts

Grants corresponding to gifts that are not designated as disaster relief are paid annually. The program year runs from January 1 through December 31. Eligible gifts received between January 1 and December 10 will be paid by December 31. Eligible gifts received after December 10 will be included with the grant payments for the following year.

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