

The CNA Foundation Matching Gifts Plan ("Plan") allows employees to make contributions to eligible non-profit organizations in the categories of higher education, arts and culture, civic and community, and health and human services.

## Who Can Participate

You are eligible to participate in the Plan if you are, at the time of the gift, either a full-time CNA employee, or a part-time CNA employee who has both worked at least 1,000 hours in the previous 12 months and completed at least six months of continuous service.

## How the Match Works

The CNA Foundation will match any eligible employee contribution of \$25 to \$5,000 on a one-to-one basis. You may contribute to as many organizations as you wish, although there is a maximum of \$5,000 per employee per calendar year. Gifts must be personal contributions, not pledges, made directly from the employee's individual funds or assets to the organization in cash, securities, check, credit card, or by electronic transfer. If you wish to match donated securities, please contact 312-822-2606 for detailed instructions.

Please note that while you may designate how your personal gift is to be used, the CNA Foundation only makes unrestricted contributions. As a result, the recipient organization may use CNA Foundation matching funds as it deems appropriate, so long as the funds are used to support its general operations.

## How to Contribute

To apply for matching funds, please complete Section A of this Form. Once you have entered the information, sign and send your contribution or gift receipt and this entire Form to the eligible organization of your choice. A financial officer at the organization will need to confirm your gift, complete and sign Section B, and mail this Form to the CNA Foundation. Upon determining your eligibility, the CNA Foundation will authorize payment. Gifts are matched at the end of the quarter following receipt of this fully signed and completed Form. Please note, this signed and completed Form (Sections A and B) must be received no later than March 1 for gifts made during the prior year.

## An Additional Note To Employees

The CNA Foundation reserves the right to refuse to match a contribution to or to terminate an employee's participation in the Plan without liability to any individual or organization. In addition, the CNA Foundation may revise, amend, suspend or terminate the Plan at any time with or without notice. The interpretation, application and administration of the Plan will be determined in the sole discretion of the CNA Foundation and its decision will be final.

## The following types of organizations and activities are generally excluded from receiving matching funds:

- Organizations without an Internal Revenue Code 501(c)(3) not-for-profit tax-exempt status
- Organizations that are supporting organizations described in Internal Revenue Code Section 509(a)(3), as amended from time to time
- Organizations that provide 25% or more of their services outside the United States or its territories
- Political causes, candidates for public office, political organizations or legislative, lobbying or advocacy efforts
- Professional associations
- Labor, alumni, and fraternal organizations, or social clubs
- Sectarian organizations or denominational religious organizations (except for programs that are broadly promoted, available to anyone and free from religious orientation)
- Organizations that discriminate by race, color, creed, gender, sexual orientation, national origin or disability
- Endowed chairs or professorships
- General endowments
- Participation in advertising books, goodwill advertising, raffles and similar endeavors
- Purchase of tickets for testimonials or similar benefit events from which only a portion of the ticket prices reaches the beneficiary not-for-profit sponsor
- Foundations that are grant-making bodies (United Way or similar federated campaigns)
- Organizations, programs and projects that pose a potential conflict of interest
- Attendance at dinners and golf tournaments
- Gifts made with funds provided to the employee for donation purposes by other individuals (pooling funds)
- Secondary or elementary schools (or organizations that benefit such schools)
- Gifts in lieu of tuition, books or other student fees, or dues paid to national or local alumni groups
- Gifts to alumni groups that are not distributed to affiliated eligible institutions
- Gifts to individuals
- Scholarship funds
- Special funds organized for the purpose of promoting athletic scholarships or athletic programs of any nature
- Local or regional scout troops (gifts to national scout organizations are eligible)

For more information about the CNA Foundation Matching Gifts Plan, contact 312-822-2606.

## CNA Foundation Matching Gifts Plan Form

### Section A – To be completed by CNA Employee

Please complete all parts of Section A and mail, along with your contribution or gift receipt, to the named organization.

Employee Name		Employee ID Number	
Home Street Address	City	State	ZIP
Amount of Gift (If securities, include value)	Date of Gift	Name of Organization	

I certify that the above information is correct. My gift is a personal contribution eligible for matching under the guidelines of the CNA Foundation Matching Gifts Plan and is not in payment of any obligation I may have to this organization or its affiliates, nor does it result in any tangible benefit to me or my family. My signature authorizes the recipient to report this gift to the CNA Foundation and apply for a matching gift under the CNA Foundation Matching Gifts Plan.

Signature	Date
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### Section B – To be completed by Recipient Organization

Please complete this section and mail to: CNA Foundation, Matching Gifts Coordinator, 333 S. Wabash, 44th Flr, Chicago, IL 60604

Recipient hereby confirms receipt of the gift described in Section A of this Form, that the gift will be used to support Recipient's general operations, and that neither recipient, nor its affiliates, is involved in any terrorist financing or other illegal activities. Recipient further confirms that the gift is not in payment of any obligation donor may have to Recipient or its affiliates, nor will the gift result in any tangible benefit to donor or donor's family,

**NOTE:** If Recipient has not previously participated in the CNA Foundation Matching Gifts Plan, please provide copy of Recipient's 501(c)(3) Federal Tax Exempt letter from the IRS and a copy of Recipient's mission statement.

Name of Organization		Federal Tax # (EIN#)	
Name of Financial Officer		Title	
Street Address	City	State	ZIP
Signature	Date		

This document must be accurate and complete. Please print or type. Do not submit electronically.  
rev. 03/13



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