

# The Federated Gift Matching Program

## Gift Matching

The Federated Gift Matching Program provides employees with the opportunity to direct corporate charitable dollars to the qualifying non-profit organizations and higher education institutions that they personally support.

**Give > Give ..... Maximize your impact!**

### **Eligibility and Frequency**

- \* All employees who work at least 30 hours per week are eligible to participate in the Federated Gift Matching Program.
- \* Employees can request one matching gift per year to be given to the qualifying organization of their choice.
- \* Gifts are processed quarterly. All request forms must be received no later than March 1, June 1, September 1, or December 1.

### **Qualifying Organizations**

Eligible organizations must be a non-profit organization with a certified tax-exempt status under the Internal Revenue Service Code 501(c)(3).

### **Ineligible**

- \* Political organizations
- \* Religious organizations
- \* Social fraternal organizations or auxiliary clubs (i.e. Rotary, Lions Club, etc.)
- \* United Way (i.e. United Way of Steele County, Valley of the Sun United Way, etc.)
- \* Any organization that represents a conflict of interest for the Company in the Company's sole discretion.

### **Gift Matching Qualifications**

The minimum gift that will be matched is \$25 and the maximum gift is \$100 per calendar year. Unused allocations cannot be carried forward.

Matching is based on actual payment received by the organization, not on commitments or pledges for payments in future years.

Federated reserves the right, at its sole discretion, to determine eligibility of the gift as well as suspend, change, or terminate the program at any time.

### **Ineligible**

- \* Charitable contributions made as part of the United Way Annual Campaign <[http://intranet.fedins.com/int\\_home/Communications/CharitableGiving/ssLINK/PROD\\_175288](http://intranet.fedins.com/int_home/Communications/CharitableGiving/ssLINK/PROD_175288)>.

\* Charitable contributions made as part of the Holiday Sharing Annual Campaign<[http://intranet.fedins.com/int\\_home/Communications/CharitableGiving/ssLINK/PROD\\_175287](http://intranet.fedins.com/int_home/Communications/CharitableGiving/ssLINK/PROD_175287)>.

\* Contributions that are not considered charitable or tax deductible (i.e. event registration, admission fees, auction item value, etc.).

Request Gift Matching

Refer to Eligibility and

Frequency<[http://intranet.fedins.com/int\\_home/Communications/CharitableGiving/PROD\\_175289#eligibilityandfrequency](http://intranet.fedins.com/int_home/Communications/CharitableGiving/PROD_175289#eligibilityandfrequency)>. Follow these procedures to request gift matching:

1. Complete Part I of MISC-1016, Federated Insurance Gift Matching Program<[http://intranet.fedins.com/int\\_home/Communications/CharitableGiving/ssLINK/PROD\\_175787](http://intranet.fedins.com/int_home/Communications/CharitableGiving/ssLINK/PROD_175787)>.
2. Mail the MISC-1016, along with your contribution, to the recipient organization.
3. The recipient organization certifies receipt of the contribution, completes Part II of the MISC-1016, and mails the MISC-1016 to the Federated Insurance - Director of Public Affairs<[http://intranet.fedins.com/int\\_home/Communications/CharitableGiving/ssLINK/PROD\\_173686#directorofpublicaffairs](http://intranet.fedins.com/int_home/Communications/CharitableGiving/ssLINK/PROD_173686#directorofpublicaffairs)>.
4. Federated's Director of Public Affairs reviews the form for eligibility and completeness.
5. If approved, Federated's Director of Public Affairs will mail the gift matching funds and a conveyance letter to the recipient organization and send a gift match notification to the employee.