

# Matching Gift Program for Higher Education **Part 1**

## Donor – Complete and Mail to the Eligible School

I enclose my gift of \$ \_\_\_\_\_ Date of Gift \_\_\_\_\_

In the form of:  Cash/Check/Credit Card  Securities

Guardian Life Insurance Company Premium, Policy Number: \_\_\_\_\_

I wish to have \$ \_\_\_\_\_ of my gift matched

Recipient School: \_\_\_\_\_

This gift is  Unrestricted  Designated for\* \_\_\_\_\_  
\*Note: Must be for scholastic purposes

Name of Donor: (Please Print) \_\_\_\_\_

First time participating:  Yes  No

Home Address: \_\_\_\_\_

I am a:  Home Office Employee  Regional Office Employee  Berkshire Employee  Retired Employee  
 Director  Spouse of \_\_\_\_\_  
 General Agent  Elite Producer  Field Representative  Retired Field Associate

Employment Date: \_\_\_\_\_

I certify that neither I nor my family will derive any direct or indirect financial or material benefit from this contribution.

I certify that this contribution does not represent payment for tuition, services or other personal financial obligations.

I have read and understood the Guidelines for Guardian's Matching Gift Program.

Donor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### OFFICE USE

Donor Eligibility	
School Eligibility	
Other _____ Contributions	
Approval	

### Regional Accrediting Associations

1. New England Association of Schools and Colleges
2. Middle States Association of Colleges and Schools
3. North Central Association of Colleges and Schools
4. Northwest Association of Schools and Colleges
5. Southern Association of Colleges and Schools
6. Western Association of Schools and Colleges

# Part 2

## Recipient School — Complete and Mail Entire Form to Address Below

I certify that a gift of \$ \_\_\_\_\_

was received on \_\_\_\_\_

from \_\_\_\_\_

(Please print name of donor)

and that this gift meets the eligibility requirements of Guardian's Matching Gift Program. I also certify that the gift qualifies under the conditions set forth in the Program.

School \_\_\_\_\_

Address \_\_\_\_\_

Name of certifying officer (Please print) \_\_\_\_\_

Title \_\_\_\_\_

Signature \_\_\_\_\_

Telephone \_\_\_\_\_

E-mail \_\_\_\_\_

Date of Certification \_\_\_\_\_

When both Parts 1 and 2 have been completed, please mail to:

Corporate Secretary's Office  
 The Guardian Life Insurance  
 Company of America  
 7 Hanover Square, H 27 A  
 New York, NY 10004-4025

A478 (12/09)



**GUARDIAN**<sup>®</sup>

Matching Gift Program  
for Higher Education

# The Program

Guardian's matching gift program is designed to encourage and supplement financial support for institutions of higher education by its employees and field associates.

Guardian will match gifts of \$25 or more based on the following limits:

- Vice Presidents, Senior Vice Presidents, and Executive Management \$5,000
- Home Office Employees, Regional Home Office Employees, and Regional Group Office Employees \$2,500
- Financial Representatives \$1,000
- Retirees' gifts will be matched at the same level as the individual qualified for at the date of their retirement

## Restrictions

The Company will **not** match:

- Gifts for non-scholastic programs (e.g., athletic programs, athletic funds, booster clubs, fraternities, or sororities)
- Gifts made for services, tuition, alumni or class dues, subscription charges, memberships, tickets, or any other personal benefit
- Funds designated to benefit an individual
- Bequests or pledges

## Eligible Participants

- Full-time employees of Guardian and Berkshire, General Agents, Career Development Managers, Field Representatives, and Elite producers who have completed at least one year of continuous service
- Members of the Board of Directors of The Guardian Life Insurance Company of America
- Retired eligible participants
- Spouses of eligible participants

## Eligible Institutions

Qualifying public or private colleges, universities, graduate, and professional schools located in the United States which are listed in the HEP Higher Education Directory and accredited by a nationally recognized regional accrediting association are eligible. The institution must have a nonsectarian accreditation and be classified by the Internal Revenue Service as a tax-exempt institution under Section 501(c)(3) to which contributions are deductible for federal income tax purposes.

Contributions to The American College are also eligible.

## Eligible Gifts

Gifts must be made to an eligible institution, its foundation, or other tax-exempt fund which will use all funds it receives for the benefit of that single institution. Any number of gifts may be contributed to any number of eligible institutions providing that each individual gift is at least \$25 and the total of all gifts does not exceed eligible limitations. Participants' gifts may be restricted or unrestricted. All matching gifts made by Guardian will be unrestricted.

The participant need not have attended the educational institution to which the gift is made.

Gifts must come from the personal funds of the participant, including securities. Securities will be valued at their quoted selling price at the close of trading on the date of the gift and evidence of the value of the securities must be provided with the application.

Premium on Guardian life insurance policies will be matched if the insured is an eligible participant, the owner and irrevocable beneficiary of the policy is an eligible institution, and if all other program rules and procedures are followed. The full premium must be paid by the participant.

## Steps for Matching a Gift

- The participant obtains this application form from Guardian and sends it with their gift to the eligible institution.
- An authorized officer of the institution certifies receipt of the gift and the eligibility of the institution and returns the form to Guardian.
- The Corporate Secretary's office verifies the eligibility of the participant and the institution, approves the form, and arranges for payment.
- Matching gifts will be paid directly to the institution. Confirmation of the payment will be sent to the donor.
- Guardian reserves the right to alter, suspend, revoke, or discontinue this program without notice, decide any question of its interpretation, application, and administration and restrict the total of gifts matched in any one year to an amount authorized by the Trustees of the Matching Gift Program.