



## **Matching Gift Program**

### **General Information**

#### **Who is eligible**

- Regular, active full-time employees of The Hartford.
- Retirees of The Hartford or its participating subsidiaries in the United States or Canada.
- Members of The Hartford Financial Services Group Board of Directors.

#### **Who is not eligible**

Individuals not specifically listed above, including:

- Inactive employees on leave-of-absence.
- Spouses of active or retired employees or outside directors.

#### **What organizations are eligible:**

- Only gifts to private high schools and higher educational institutions that meet specific criteria outlined in this web-site are eligible.
- On both the date of the gift and the date of the matching contribution, recipient organizations must be recognized as tax-exempt, nonprofit organizations as defined under Section 501 (c) (3) of the U.S. Internal Revenue Code.
- Schools not based in the United States, Puerto Rico, and the U.S. Virgin Islands qualify only if they have established a U. S.-based affiliate that has been granted tax exempt status pursuant to Section 501 (c) (3) of the U.S. Internal Revenue Code.

**More detailed criteria appear under Educational Matching Gifts.**

#### **What gifts are eligible:**

- Personal contributions of cash actually paid, not merely pledged, to an eligible institution in support of its primary objective.
- A contribution of securities having a quoted market value. The value of securities for the purpose of valuing the gift will be the closing price on the date of transfer.

#### **What Gifts are NOT eligible:**

- Money collected from a group of people paid by sponsors to participate in walkathons, telethons and similar fund-raising activities, as well as gifts paid through a third party.
- Non-cash gifts of real estate, personal property or personal services (e.g., works of art rare books or donated labor).
- Gifts that are made as a consequence of, or lead to, material, direct benefit to the donor a member of the donor's family or an individual designated by the donor, or are used to satisfy a legal

obligation.

### **How much is matched:**

The Hartford will match, on a dollar-for-dollar basis, the **tax deductible portion** of individual gifts at the minimum and maximum levels shown below:

**Minimum Amount:** Only **individual** gifts of **at least \$10** are eligible: group collections are not eligible. If you do not wish to have your gift matched in full, please specify the amount you wish to have matched. The minimum amount applies to gifts for active employees, retirees and directors.

**Maximum Amount:** The maximum total gift amount per individual donor that will be matched per calendar year is **\$2,000**. The maximum amount applies to employees, retirees and directors.

The total budget for each fiscal year will be divided into two equal parts. Half will be set-aside for the first payout cycle and the remainder for the second payout. If all of the allocated funds for the first period are not exhausted with the first payout, the balance will be rolled over into the second six-month period.

If applications exceed the program budget all applications will receive an equal share in matching funds. For example, if the application totals exceed the one half yearly budget by 5% each matching gift will be reduced by 5%.

### **Education Matching Gifts:**

#### **Eligible High Schools:**

In addition to meeting the criteria listed in the General Information section, eligible institutions must be accredited by the appropriate regional, state or professional accreditation agency.

Tax exempt independent educational funds are also eligible if their sole purpose is to raise money for the constituent private high school members.

#### **Ineligible High Schools:**

Public tax supported high schools are not eligible.

Private high schools which are not properly accredited are not eligible.

#### **Eligible higher educational institutions:**

In addition to meeting the criteria listed in the General Information section, eligible institutions must:

- Be degree-granting two or four year private or public colleges and universities, graduate professional schools and junior colleges offering at least two years of college level studies.
- Be accredited by a nationally recognized regional or professional accrediting association.

Tax-exempt, independent educational funds qualify if their sole purpose is to raise money for their constituent member colleges, which are individually eligible under the program (e.g., United Negro College Fund, associations for independent colleges or community educational foundations).

Gifts to alumni funds or foundations affiliated with an eligible higher educational institution also qualify if such fund or foundation has itself been recognized as tax exempt under Section 501 (c) (3) and all contributions are

applied directly to or support academic programs of these schools.

**Note: Matching gifts from The Hartford are unrestricted and are paid directly to the school.**

### **Ineligible higher educational institutions:**

- Fraternities, sororities, honor societies, educational associations and campus organizations.
- University television and radio stations.

### **Ineligible educational gifts:**

In addition to the exclusions listed previously the following educational gifts are NOT eligible:

- Payments for tuition, class dues, books, uniforms or other student fees.
- Gifts to support physical education, athletic programs or athletic scholarships.
- Gifts to support salaries or other forms of employee compensation and/or benefits.
- Gifts to scholarship funds established in the name of the donor or for which the donor designates the scholarship recipient.

### **When to register your gift:**

Gifts must be registered within one year from the date of the gift.

### **How to register your gift for matching:**

**Giving Programs:** From your PC, you may register [your Matching Gift requests](#) online. By clicking above, you will be provided with an on-line form which you fill out and electronically submit. The transaction takes place in a **secure** environment. Giving Programs will store your donor profile (e.g. name and address) on your PC, eliminating the need to re-type this information each time you request a matching gift.

After you have registered your gift, we will forward a form to the recipient school which they need to complete and return to us in order for the matching gift to be approved. The Hartford must receive the completed form back from the recipient school within 180 days from the date that the gift was registered in order for the gift to be matched. Matching gift checks will be mailed in April and in October of each year.

**By phone:** If you experience any difficulties while registering your gifts on-line, you may phone the Matching Gift Center at (772) 403-2029 between the hours of **8 a.m. to 7p.m. Monday through Friday**. A representative there will be able to register your gift by phone.

### **Conditions:**

The interpretation, application and administration of this program, which may be amended, suspended, revoked or terminated at any time, will be determined by The Hartford. No obligation is imposed upon or accepted by The Hartford by reason of the Matching Gift Program.

Institutions that meet the specific criteria listed in these guidelines will be considered for participation, but determination of an institution's initial and continuing participation shall be made solely by The Hartford.

If at any time a matching gift is found to have been generated by an ineligible individual or organization, The Hartford will expect return of the gift by the recipient organization. Please note that continued misuse of Matching Gift Program funds could cause an organization to lose its eligibility for matching funds.

The Hartford reserves the right to request any supporting documentation it considers necessary.

