



# Community Matching Gifts Program

## Guidelines for ING Registered Representative Participation

The *ING Community Matching Gifts* program is supported by the ING Foundation and supplements financial contributions made by ING registered reps, which help to meet the financial needs of non-profit organizations. The Program allows eligible participants to generate financial support for qualifying organizations of their choice.

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### Program Procedures

- The ING Foundation Community Matching Gifts program matches contributions to eligible organizations, fifty cents on the dollar, from a **minimum contribution of \$25** to a maximum **one-year total of \$1,000** per eligible contributor in any calendar year ending December 31.
- Contributions must be made from the personal funds of the eligible participant either in cash, check or credit card. Contributions *may not* be unpaid pledges. No other form of personal or real property is will be matched.
- Matching Gifts will be made quarterly. Donor limits are based on the date of the request and based on a calendar year. Matching Gifts requests must be submitted within one year from the date of the contribution.
- The ING Foundation places no limit on the number or dollar amount of Matching Gifts an organization may receive from eligible participants.
- Gifts will be matched at 50 percent up to the program's yearly grant budget of \$500,000 dollars. In the event that the programs yearly grant budget is reached, requests are matched on a first come, first serve basis. Once ING reaches the \$500,000 dollar maximum the program will be over for the year. You may submit applications for the following year.
- The ING Foundation *does not* match requests for dues, subscription fees, tuition or student fees; or contributions that are not made directly to eligible non-profit organizations. Participants *may not* receive goods, services or benefits in return for their own or the Foundation's donations.
- **The ING Foundation will neither process nor return incomplete applications.**
- Religious organizations, unless the specific program is nondenominational in nature and benefits a broad range of the community (e.g., soup kitchen, homeless shelter or hospice center operated by a church, temple or other religious-affiliated organization). **Such purpose must be clearly identified on the submitted application within the designation/purpose field.**
- Organizations representing conflicts of interest for the applicant, ING Foundation, ING Americas or any of its employees or assigns.
- United Way umbrella organizations and any other federated fundraising workplace campaigns. (A separate corporate policy exists for matching United Way gifts.)
- Organizations and member associations, which may have non-inclusive policies in nature. ING has a corporate policy of inclusion. Unfortunately, Boy Scouts of America is one of the organizations that has a non-inclusive policy.

### Eligible Participants

- Non-employee registered representatives with Financial Network, ING Financial Advisers, ING Financial Partners, Multi-Financial and PrimeVest.

### Eligible Organizations

- Eligible organizations must be located in the U.S. or one of its possessions and be recognized by the Internal Revenue Service as tax exempt under 501(c)(3) or 509 (a)(1,2, or 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. Organizations recognized by this program render services in the broad classifications of urban, health, education, civic and cultural affairs.

### Ineligible Organizations

- Organizations whose chief purpose is to influence legislation or participate in political campaigns on behalf or against any candidate for public office.

### How The Program Works

Matching gift requests can be submitted by paper.

#### The employee should:

- Complete part 1 of the *original* application form.
- Mail the *original* application form, with the donation and any other necessary documentation, to the organization of your choice that meets the criteria listed in the guidelines. **Faxed copies will not be accepted.** The matching grant to be provided by ING will be designated for unrestricted support.

#### The recipient organization should:

- Complete part 2 of the *original* application form.
- **PLEASE INCLUDE YOUR 501 (c)(3) LETTER WITH YOUR APPLICATION**
- The authorized officer of the designated organization must verify the donation, sign the application form and return the *original* application form to the ING Foundation Community Matching Gifts Program, P.O. Box 8499, Princeton, NJ 08543- 8499

For more information, please contact the Matching Gifts Program via email at [ing@easymatch.com](mailto:ing@easymatch.com) or by phone at 1-866-205-5955.

Eligible requests are processed and matched to organizations on the following quarterly schedule.

Received by: 3/1	6/1	9/1	12/1
Processed by: 3/31	6/31	9/31	12/31

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*The ING Foundation reserves the right to change or withdraw the ING Foundation Community Matching Gifts program without notice, to decide any question of eligibility or interpretation of the Program and to change or restrict the amount of any gift or total gift to be matched in any one year to any amount authorized by the ING Foundation.*



# Community Matching Gifts

## ING Registered Representative Application

**Donor Instructions:**

- ◆ Complete Part 1 of this form – one for each gift. *Please print or type.*
- ◆ Send the form and a copy of the program guidelines with your contribution to the recipient organization.

**Recipient Organization Instructions:**

- ◆ Verify receipt of gift.
- ◆ Complete Part 2 of this form. *Please print or type.*
- ◆ If this is your first matching gift request to the ING Foundation Community Matching Gifts Program, please enclose a copy of your Internal Revenue Service 501(c)(3) IRS determination letter and a brief description of your organization’s primary mission statement or purpose.
- ◆ Forward form to the address printed below.

**Part 1 - Donor Section**

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Contributor

Contributor Broker-Dealer (Please check one)

- Financial Network
- ING Financial Advisers
- ING Financial Partners
- Multi-Financial
- PrimeVest

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

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Business/Home Telephone

\_\_\_\_\_  
Business/Home E-mail

\_\_\_\_\_  
Exact Date of Gift

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Amount of Gift (min \$25)                      Amount to be Matched (min \$25)

Type of Contribution (Please check one)

- Cash/Check     Credit Card

\_\_\_\_\_  
Recipient Organization Name

\_\_\_\_\_  
Recipient Organization City, State

\_\_\_\_\_  
Restriction or Purpose (if any)

*I hereby state that the information I have provided is complete and correct, and that my contribution hereby complies with the program guidelines stated:*

\_\_\_\_\_  
Signature of Contributor

\_\_\_\_\_  
Date

**Part 2 – Recipient Organization Section**

\_\_\_\_\_  
Employer Identification Number (EIN)

\_\_\_\_\_  
Name of Organization/Organization Foundation

\_\_\_\_\_  
Organization Mailing Address

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Telephone, including area code

\_\_\_\_\_  
Fax, including area code

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

\_\_\_\_\_  
Website Addresses (if any)

\_\_\_\_\_  
Date of Contribution

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Amount of Contribution                      Tax Deductible Contribution Amount

*As an authorized officer of this institution, I verify that this organization satisfies requirements of the ING Foundation Community Matching Gifts Program and has tax-exempt status from the U.S. Internal Revenue Service. I further certify that the contribution and the ING Foundation’s matching gift will not result in a benefit or service for the contributor or members of his or her family:*

\_\_\_\_\_  
Printed Name of Organization Representative

\_\_\_\_\_  
Title of Organization Representative

\_\_\_\_\_  
Signature of Organization Representative

\_\_\_\_\_  
Date

**Please mail completed form and any required enclosures to:**

ING Foundation Community Matching Gifts Program  
P.O. Box 8499  
Princeton, NJ 08543-8499

Phone: 1-866-205-5955

E-mail: [ING@easymatch.com](mailto:ING@easymatch.com)

*Incomplete forms will not be processed or returned to the recipient organization and are ineligible to receive a match*