

[Home](#)[Organization](#)[Contact Us](#)[FAQ](#)[Guidelines](#)[Site Map](#)

Matching Gifts Program
Guest: February 23, 2007



MATCHING GIFTS PROGRAM GUIDELINES

The company's goal is to foster commitment to shared responsibility by corporations and individuals in responding to the needs of their community.

The John Hancock Matching Gifts Program was expanded in response to associates' requests for greater flexibility in giving. The expanded program also increases the amount of support associates can direct to non-profit organizations.

[Back to Top](#)

HOW DO I REGISTER A GIFT?

[INTERNET REGISTRATION](#) - Connect to the John Hancock Matching Gifts Program from the office through the Hancock Hub or from home at: www.easymatch.com/jhancock.

[PAYROLL DEDUCTION](#) - Payroll deduction provides a convenient and easy way to support the non-profit organizations (excluding educational institutions) of your choice. The next open enrollment period for payroll deduction is scheduled for October 3rd to October 17th, 2005 for deductions beginning in January 2006.

[Back to Top](#)

INTERNET REGISTRATION

Who is eligible to apply?

1. All full-time salaried home office and field employees of John Hancock and participating subsidiaries
2. General Agents and any of their marketing representatives who have an active whole-time commission agreement, and any full-time agency employee
3. Members of the Board of Directors

What institutions are eligible?

All institutions, organizations, associations and funds must be non-profit, qualified as 501(c)(3) tax exempt by the Internal Revenue Service of the U.S. Treasury Department and meet the following criteria:

Non-profit Organizations

Human Services Agencies

Gifts to United Ways, community agencies, vocational rehabilitation agencies, relief agencies, and elderly, youth, civic and urban programs.

Hospitals and Health Agencies

Gifts to accredited hospitals, health agencies, health care services, physical rehabilitation programs, alcoholism and drug abuse programs.

Cultural Organizations

Gifts to libraries, ballets, museums, operas, symphonies, theaters, performing and visual arts groups, public broadcasting corporations and literary societies, and such other arts and cultural organizations as the company may recognize. Memberships that are considered contributions to the receiving organization also qualify for matching, as long as no benefit or service is returned to the donor. Eligible organizations must be supported primarily by funds from the general public.

Environmental Organizations

Gifts to organizations which protect, sustain or promote environmental health and natural resources such as ecosystems, rivers, watersheds, parks, gardens, recreation areas, wilderness and/or biological diversity, including zoological societies, botanical gardens and federations of environmental groups such as Earth Share.

Educational Institutions

Any Private, Independent Elementary and Secondary School accredited by a nationally recognized accrediting agency. Public and parochial schools are excluded (see [Frequently Asked Questions](#) for definition).

State Licensed Schools of Special Education for primary or secondary school children with physical or mental handicaps.

Any Private or Tax-supported College, university, graduate or professional school in the United States or Canada listed in the *Higher Education Directory* or similar directory.

An Alumni or Other Fund, foundation or association, when it is certified by an institution qualified above to be either an integral part of that institution or an organization that will transmit all contributions directly to the institution or will use those contributions solely for the benefit of that institution.

Associations, Funds or Foundations that collect funds for eligible educational institutions qualified above, such as the United Negro College Fund, Independent College Funds of America, etc.

Public School Foundations

What is an eligible gift?

Minimum/Maximum

- The minimum gift considered for matching is **\$25**
- The company will match on a **100%** basis all gifts to eligible non-profit organizations (excluding educational institutions) up to an aggregate calendar year maximum of **\$3,000** per donor.
- The company will match on a **50%** basis all gifts to eligible educational

institutions up to an aggregate calendar year maximum of **\$3,000** per donor.

- The maximum amount of company participation is **\$4,500** (\$3,000 maximum match for gifts to eligible non-profit organizations [excluding educational institutions] plus \$1,500 maximum match for gifts to eligible educational institutions) per donor annually.

Gifts

- The contribution must come from the personal funds of the contributor and be in check or securities. The contribution must qualify under the Internal Revenue Code as a charitable contribution from the contributor. The company will determine the value of securities as of the last sale or published bid price on or before the date of the gift.
- Matching gifts made by the company will be for the unrestricted use of the recipient institution.
- A contribution made by an eligible contributor in the name of his or her spouse will be treated as though made in the contributor's name for purposes of this program.
- The company will consider as an eligible gift, the amount of life insurance premiums due during the calendar year and paid by an eligible contributor on a John Hancock policy if the policy designates an eligible institution as sole owner and beneficiary. The insured must be an eligible contributor.
- Gifts can be registered up to 12 months from the date of the gift. For the purposes of calculating maximum limits, gifts will be credited in the year the gift is made, regardless of when the gift is registered.

What is an ineligible gift?

*John Hancock will **not** match:*

- Payments for tuition, books or other student fees.
- Gifts paid to an eligible institution directly to defray tuition or other expenses of a designated individual
- Bequests
- Gifts of articles
- Pledges
- Payments for services or materials received
- Amounts payable as subscription fees for publications
- Gifts to political organizations or organizations whose primary purpose is political lobbying
- Gifts to fraternal, professional, social or veterans' organizations
- Gifts to organization which qualify for tax exemption under the blanket of a church, synagogue, or other religious organizations whose programs are predominantly to pursue a religion, sect or cult
- Gifts to organizations having illegal or discriminatory practices or whose programs are inimical to the interests of society or the company
- Pooling of gifts
- Gifts to parochial schools. "Parochial" means the school is under the jurisdiction and tax exemption of a church or other religious organizations. Schools that have a separate board of directors, budget and their own 501(c)(3) tax exemption are considered "private, independent" schools, not parochial schools.

Necessarily, the company reserves the right to change the provisions of or discontinue its Matching Gifts Program at any time and to decide all questions of interpretation which may arise in connection with the administration of the program. Its decisions will be final.

[Back to Top](#)

PAYROLL DEDUCTION

Who is eligible to apply?

1. All full-time salaried home office and field employees of John Hancock and participating subsidiaries

What institutions are eligible?

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Non-profit Organizations

Human Services Agencies

Gifts to United Ways, community agencies, vocational rehabilitation agencies, relief agencies, and elderly, youth, civic and urban programs.

Hospitals and Health Agencies

Gifts to accredited hospitals, health agencies, health care services, physical rehabilitation programs, alcoholism and drug abuse programs.

Cultural Organizations

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Environmental Organizations

Gifts to organizations which protect, sustain or promote environmental health and natural resources such as ecosystems, rivers, watersheds, parks, gardens, recreation areas, wilderness and/or biological diversity, including zoological societies, botanical gardens and federations of environmental groups such as Earth Share.

Educational Institutions are not eligible for Payroll Deduction.

What is an eligible gift?

Minimum/Maximum

- The minimum gift considered for matching is **\$25**. Please note your payroll deduction contribution must total \$25 or more annually per organization. There is no limit on the number of non-profit organizations you may enroll for payroll deduction.
- Gift to educational institutions are **not** eligible for payroll deduction.
- The company will match on a **100%** basis all gifts to eligible non-profit organizations (excluding educational institutions) up to an aggregate calendar

year maximum of **\$3,000** per donor.

Gifts

- Payroll deduction authorizations can be made only once each year, during the fall enrollment campaign. Deductions will be effective for the following calendar year. Deductions will continue until you ask us to change or stop them.
- The gift amount may not be changed during the year, except to be canceled. You may cancel your payroll deduction at any time. If you enroll more than one non-profit organization and want to cancel one deduction, you must cancel all of your deductions.
- Matching gifts made by the company will be for the unrestricted use of the recipient institution.
- Payouts are matched quarterly, generally in April, July, October and January.

What is an ineligible gift?

*John Hancock will **not** match:*

- Gifts to educational institutions are ineligible for payroll deduction
- Gifts to political organizations or organizations whose primary purpose is political lobbying
- Gifts to fraternal, professional, social or veterans' organizations
- Gifts to organization which qualify for tax exemption under the blanket of a church, synagogue, or other religious organizations whose programs are predominantly to pursue a religion, sect or cult
- Gifts to organizations having illegal or discriminatory practices or whose programs are inimical to the interests of society or the company

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[Back to Top](#)

[Home](#) | [Organization Lookup](#) | [Giving History](#) | [Submit a New Request](#) | [Download Forms](#)
[FAQ](#) | [Guidelines](#) | [Site Map](#) | [Contact Us](#)

