

MATCHING GIFT PROGRAM APPLICATION

DONOR – COMPLETE AND MAIL APPLICATION WITH CONTRIBUTION TO RECIPIENT ORGANIZATION

Donor's Name (Printed)		Email Address
Donor's LFG Company Name, Address, City, State, ZIP – Retirees should list home address		
Contribution Amount \$	Date of Contribution	Daytime Phone Number
Organization Receiving Contribution		
Purpose of Contribution		
<i>By signing below, you certify that this contribution qualifies as a tax deductible gift, is not a pledge, group gift, workplace campaign donation, or tuition payment and that neither you nor any of your family will derive any direct or indirect financial benefit or receive any other consideration of any kind as a result of this contribution.</i>		
Donor's Signature		Date
Donor is a(n): <input type="checkbox"/> Full-time Employee <input type="checkbox"/> Corporate Leadership Committee (CLG) <input type="checkbox"/> LFA Planner under the Core Agent Model <input type="checkbox"/> Member of Lincoln National Corporation Board of Directors	<input type="checkbox"/> Part-time Employee <input type="checkbox"/> Senior Management Committee (SMC) <input type="checkbox"/> Life & Annuity Sustaining Premier Partner (ABGA, GA, MGA, and former DAN Channels) <input type="checkbox"/> Retired Employee, Financial Planner, or Member of Lincoln National Corporation Board of Directors	

RECIPIENT ORGANIZATION – COMPLETE AND MAIL APPLICATION AND COPY OF 501(C)(3) LETTER to Lincoln Financial Foundation, P.O. Box 7863, Fort Wayne, IN 46801-7863

Organization's Legal Name		Tax ID Number
Address, City, State, ZIP		Telephone Number
Organization's Mission Statement		
Is contribution amount 100% tax-deductible? Yes ____ No ____	If No, please indicate amount that is tax-deductible: \$	
Contribution applied toward (i.e., general operating, sporting event fundraiser, scholarship, donor membership, etc.):		
<i>By signing below, you certify that you have received the gift described above. You also certify that this organization is a nonprofit institution/organization and contributions to it are tax deductible under Sections 501(c)(3) and 170(b) of the Internal Review Code of the United States. This organization is not a private foundation as described in Section 509(a) of the Internal Revenue Code, nor does it discriminate on the basis of race, sex, color or creed. Furthermore, you certify that no goods or services are being exchanged as a result of this gift. Contributions from Lincoln Financial Foundation may not be considered a gift from the individual donor listed above.</i>		
Signature		Date
Name (Printed)	Title	Email Address

Incomplete, illegible or inaccurate applications will be returned to the donor.

MATCHING GIFT PROGRAM GUIDELINES

The Lincoln Financial Foundation Matching Gift Program exists to encourage employees, financial planners, and retirees to participate in their communities by supporting human services, arts and culture, and education projects. Qualifying individuals must adhere to the following guidelines and requirements.

Through the Matching Gift Program, the Lincoln Foundation will match, dollar-for-dollar, contributions to qualifying nonprofit organizations.

- Forms received after December 1 will be matched in the following calendar year, but will be applied to the prior year's limit. Applications received after March 1 for a gift made the previous year will not be accepted.
- Matching gifts are made to recipient organizations on an unrestricted basis.
- The minimum amount eligible for a matching gift is \$50.
- The annual maximum for donors varies according to donor class (see below). Once the donor reaches the annual maximum, no more applications will be accepted for that donor.
- Contributions must qualify as a tax deductible gift, not a pledge, group gift, membership dues or tuition payment; and donor must not derive any direct or indirect financial benefit or receive any other consideration of any kind as a result of his/her contribution.
- A donor may submit only one application per organization each program year.
- Matching gifts are available on a first come, first serve basis. Once the Matching Gift Program funds are depleted, applications will no longer be accepted.

DONOR ELIGIBILITY

The following individuals are eligible to participate in the Matching Gift Program:

- Full-time Employees
- Lincoln Financial Advisors (LFA) Planners who are under the Core model agent contract and Life & Annuity Sustaining Premier Partners (ABGA, GA, MGA, and former DAN Channels)
- Members of the Corporate Leadership Group and Senior Management Committee
- Members of Lincoln National Corporation Board of Directors
- Retired Employees/Financial Planners/Members of Lincoln National Corporation Board of Directors

DONOR CLASSES

- Full-time Employees have an annual maximum of \$2,500.
- LFA Planners have an annual maximum of \$5,000.
- 2013 Life & Annuity Sustaining Premier Partners who are members of ABGA, GA, MGA, and former DAN Channels have a maximum equal to their 2013 Image Builder reimbursement amounts or \$5,000, whichever is less.
- Corporate Leadership Group members have an annual maximum of \$5,000.
- Senior Management Committee members have an annual maximum of \$10,000.
- Members of Lincoln National Corporation Board of Directors have an annual maximum of \$10,000.
- Retired Employees/Financial Planners/Members of Lincoln National Corporation Board of Directors have an annual maximum of \$1,250.

MATCHING GIFT PROGRAM GUIDELINES

Page Two

RECIPIENT ORGANIZATION ELIGIBILITY

U.S.-based nonprofit organizations with a current 501(c)(3) status with the Internal Revenue Service are eligible to apply for a matching gift. The Lincoln Foundation supports only those organizations that respect diversity and adhere to non-discriminatory practices.

The Lincoln Financial Foundation Matching Gift Program **WILL NOT** match gifts to:

- Workplace campaign donations, i.e., United Arts or United Way*
- Religious or political organizations
- Hospitals, hospital programs, hospital foundations, or nursing homes
- Family and community foundations and other re-granting organizations
- Sporting events, i.e., golf tournaments and walk/run events
- Sports organizations and athletic associations
- Service or fraternal organizations
- International organizations and aid/relief efforts
- Individuals
- Tax-supported organizations
- Gifts to colleges/universities not academic in nature, i.e., athletics, radio or television stations

Eligible colleges/universities must:

- Be a 4-year or 2-year college or university, a graduate school, professional school or junior college
- Be listed by the American Council of Education as an accredited institution
- Be located in the United States
- Not discriminate against students or faculty in admission, hiring or promotion on the basis, of race, religion, national origin or sex

Gifts to the American College and the United Negro College Fund are eligible for matching gifts.

* Donors in the following cities cannot submit matching gift applications for United Way donations: Concord, NH; Fort Wayne, IN; Greensboro, NC; Hartford, CT; Omaha, NE; and Philadelphia, PA.

HOW TO APPLY

The donor should complete the top section of the Matching Gift Program application form and mail it, along with the contribution, to the recipient organization. The recipient organization should then complete the bottom section of the application and mail the completed form, **with a copy of its 501(c)(3) letter**, to:

Patti Grimm, Program Manager
Lincoln Financial Foundation
P.O. Box 7863
Fort Wayne, IN 46801-7863

Questions concerning the Matching Gift Program can be directed to Patti Grimm, Program Manager, at the Lincoln Foundation's address, by calling 260-455-3636, or faxing 260-455-4004.

Incomplete, illegible or inaccurate applications will be returned to the donor.

The Lincoln Foundation will determine whether the applicant nonprofit organization is eligible to receive a matching gift. Awarded gifts will be sent directly to the recipient organization.

