



Marsh & McLennan Companies  
Marsh • Putnam • Mercer

# MMC MATCHING GIFTS TO EDUCATION PROGRAM

*Marsh & McLennan Companies values education as one of its most important investments. The Matching Gifts to Education Program provides funding to educational institutions that are entrusted with nurturing the minds of our children and cultivating the talents and skills of our future workforce. The Program is designed to encourage the personal giving of employees and allows employees to request a corporate match of their gifts to eligible educational institutions. Below are the guidelines of the MMC Matching Gifts to Education Program.*

## Eligible Donors

- Current salaried employees of MMC and its subsidiaries located throughout the United States and Canada
- Spouses and domestic partners of qualified employees (domestic partners must have on file with the MMC Benefits Department an affidavit of domestic partnership)
- Members of the Board of Directors of MMC and its operating companies

## Eligible Institutions

- Private elementary and secondary schools.
- Institutions offering a 2-year or 4-year degree, including universities, colleges, graduate schools, technical institutions.
- Institutions must be located in the United States or in Canada.
- Institutions must be fully accredited by one of the six regional accrediting agencies or a recognized professional accrediting agency.
- Institutions must be recognized by the United States Internal Revenue Service as tax-exempt under section 501(c)(3) of the Internal Revenue Code or as an organization to which tax deductible contributions can be made as a registered charity with Revenue Canada Taxation.
- Alumni associations may be eligible provided they have tax-exempt status and are certified by the eligible educational institution with which they are affiliated.
- Non-athletic scholarship funds are eligible provided they are administered by an eligible educational institution.

## Matching Gifts

MMC will match gifts from a minimum of \$50 to a maximum aggregate of \$5,000 per employee per calendar year to eligible educational institutions on a dollar for dollar basis, including those gifts made individually or jointly with a spouse or domestic partner. A matching gift will be based on payments actually completed and not on pledges or commitments for future payments. The matching gift is for the unrestricted use of the receiving institution, although the donor may specify that his or her contribution be used for a designated purpose or project. The employee must indicate this designation on the matching gift application form.

## Eligible Gifts

- Contributions must come from the personal assets of an eligible donor. Group gifts, gifts made through pooled income funds, charitable gift funds and donor advised funds are not eligible.
- Contributions can be in the form of cash, check, credit card charge or securities. If securities are given, they should be valued for matching purposes at their quoted market value at the close of trading on the day the gift is made.
- An application for a matching gift must be submitted to the recipient organization and received by MMC within one year of the date of the gift to be eligible.

## Ineligible Gifts

- Gifts to public elementary, junior and high schools
- Gifts to pre-kindergarten institutions, such as nursery schools and child-care centers
- Gifts of property, goods or services
- Gifts to athletic funds, sports teams, broadcasting stations, student clubs, fraternities and sororities
- Gifts to parent teacher associations (PTAs) and parent teacher student associations (PTSAs)
- Gifts made for bequests, dues, subscription or membership fees, insurance premiums, tuition payments or payments in lieu of tuition, books, raffles, auctions, tickets to events sponsored by or benefiting an educational institution

## Instructions

Requests for matching gifts may be submitted in one of two ways:

1. Online application via the MMC Matching Gifts to Education Program website at [www.easymatch.com/MMC](http://www.easymatch.com/MMC). Access is available 24 hours daily.
2. Paper submission. The employee completes Part A of this form and forwards it with the contribution to the educational institution. The educational institution completes Part B and returns the form to:

MMC Matching Gifts Program  
P.O. Box 3468  
Princeton, NJ 08543-3468

After verification that the gift has been received in accordance with MMC program guidelines and that the institution qualifies for a matching gift, a check will be forwarded by MMC to the institution identifying the employee as the applicant for the match. Matching gift forms are processed quarterly as follows:

Forms received by:	Matching gifts sent:
March 1	March 31
June 1	June 30
September 1	September 30
December 1	December 31

An annual statement will be sent to donors at the end of the first quarter of each year summarizing the previous year's account activity.

## Contact Information

The MMC Matching Gifts to Education Program website, [www.easymatch.com/MMC](http://www.easymatch.com/MMC), offers employees 24-hour-a-day access to their giving history, account status, eligible organizations, guidelines and printable forms. Questions can be addressed by calling toll free: (877) 427-4483, by fax: (609) 799-8019 or e-mail: [mmc@easymatch.com](mailto:mmc@easymatch.com)

## Administration

MMC reserves the right to suspend, revise, revoke or terminate this program at any time. The interpretation, application, provision and administration of this program shall be determined by MMC and its decision shall be final.

# MMC MATCHING GIFTS TO EDUCATION PROGRAM APPLICATION

## Part A: To be Completed by Donor

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Complete this form and forward it with your gift to the educational institution you name below. Do NOT fax or e-mail this form to the recipient institution. One form must be completed for each gift given.

\_\_\_\_\_  
Employee name

\_\_\_\_\_  
Date of gift (mm/dd/yy)

\_\_\_\_\_  
Name of co-donor, if applicable

\_\_\_\_\_  
Amount contributed

\_\_\_\_\_  
Amount to be matched

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

\_\_\_\_\_  
If securities are given:

\_\_\_\_\_  
Name of company/entity

\_\_\_\_\_  
Title of security

\_\_\_\_\_  
Office address

\_\_\_\_\_  
Number of shares

\_\_\_\_\_  
Share value

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Office telephone

I confirm that this gift is a personal contribution and has been given in accordance with the terms and conditions of the MMC Matching Gifts to Education Program. I understand that abuse or failure to comply may result in termination of my gift matching privileges and may lead to other disciplinary action.

\_\_\_\_\_  
Full name of educational institution

\_\_\_\_\_  
Gift designation, if any (e.g., law school, building campaign)

\_\_\_\_\_  
Employee signature

\_\_\_\_\_  
Date

## Part B: To be Completed by Educational Institution

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Complete this section and mail the completed form to: MMC Matching Gifts Program, P.O. Box 3468, Princeton, NJ 08543-3468.

\_\_\_\_\_  
Full name of educational institution

This is to certify that the gift described above was received and accepted by this institution as a charitable contribution and is in accordance with the terms and conditions of the MMC Matching Gifts Program as described on the reverse side of this form.

\_\_\_\_\_  
Street address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Authorized signature

\_\_\_\_\_  
Federal Tax I.D. # (EIN#)

\_\_\_\_\_  
Printed name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Fax

\_\_\_\_\_  
Title

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

\_\_\_\_\_  
Website address

\_\_\_\_\_  
This institution is accredited by:

\_\_\_\_\_  
Amount of gift received

\_\_\_\_\_  
Tax deductible gift amount

\_\_\_\_\_  
Date gift received (mm/dd/yy)