



Matching Gift Program

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Why does OneBeacon offer a Matching Gift Program?

Through OneBeacon's Matching Gift Program, the company supports employee gifts to nonprofit agencies and schools throughout the U.S. and extends the reach of OneBeacon's corporate giving beyond our site communities. By matching employee gifts, employee and company resources are leveraged for maximum community benefit. By using the Matching Gift Program, OneBeacon employees can double their impact using OneBeacon's support.

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Why should I give through OneBeacon's Matching Gift Program?

OneBeacon's Matching Gift Program is designed to make giving easy, convenient and meaningful to you, and the benefits of the program are numerous. One benefit is that OneBeacon matches your donation to qualified institutions. This effectively doubles your contribution, while allowing OneBeacon to support your community investments and involvement.

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Who is responsible for the guidelines?

The guidelines for the program are established by OneBeacon Matching Gifts Program. These guidelines are reviewed on an annual basis. If you have any suggestions or questions about the guidelines please send e-mail to onebeacon@easymatch.com.

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How much will OneBeacon match per year?

OneBeacon will provide a maximum cap of \$1,500 per employee per calendar year for the combined Matching Gifts. Financial gifts are matched on a 1:1 basis. Within the Matching Gift Program, the minimum eligible gift is \$25. You may contribute to one or more educational institutions each year, but the OneBeacon match will not exceed the \$1,500 limit per employee per year.

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Who is eligible to participate in the OneBeacon Matching Gift Program?

All regular, full- or part-time U.S.-based OneBeacon employees can participate. Temporary employees, interns, retirees and contractors are not eligible for the programs.

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What types of organizations are eligible to receive a grant?

Nonprofit organizations located in the United States or one of its possessions and recognized by the Internal Revenue Service as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS Code.

Eligible organizations include: private secondary schools, public or private junior colleges, universities, or graduate or professional schools located in the United States or its possessions.

The school's admission policy must meet the requirement of IRS section 501(c)(3) status, i.e., the school must agree to adhere to a policy of non-discrimination (Revenue Procedure 75-50)

In addition, the school must be accredited by an independent accrediting body.

OneBeacon also matches tax-deductible gifts to alumni funds or foundations benefiting an eligible institution.

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What is a 501(c)(3)?

A 501(c)(3) is a section of the Federal Tax Code, which establishes the criteria for tax-exempt charitable organizations. An organization must have 501(c)(3) status (be tax exempt) in order to receive matching funds. Note that not all 501(c)(3) organizations qualify for the program.

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Can I use the OneBeacon Matching Gift Program to match my donation to my child's public school or Parents Association?

No – only private institutions, as defined by the IRS, are eligible for the match.

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Are all gifts to eligible organizations matched?

Not necessarily. Even if an organization is eligible, certain types of gifts are not. Types of gifts that are not eligible for matching include:

- Gifts made by or through Community Trusts or similar organizations, including Charitable Remainder Trusts, Donor Advised Funds, or Family Foundations
- Gifts made in lieu of tuition payment for services
- Fees for service or tuition payments
- Membership fees for which benefits are received
- Dues to alumni(ae) or similar groups
- Gifts or payments for primarily political or religious purposes
- Subscription fees for publications
- Insurance premiums
- Bequests or life income trust arrangements
- Gifts of real or personal property
- Cumulative gifts from several individuals reported as one contribution

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Why isn't a donation to a "Charitable Gift Fund" eligible?

The OneBeacon Matching Gifts Program only matches charitable donations made directly from an eligible donor's personal funds directly to an eligible recipient organization. A donation to a Charitable Gift Fund is not a donation to an eligible organization because a Charitable Gift Fund is not an accredited educational institution. The donor receives a personal tax deduction for a charitable donation. At that point, the funds are no longer the funds of the donor. The holder of the 501(c)(3) for the Charitable Gift Fund is now the owner of the funds.

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How do I determine the tax-deductible portion of my donation?

A charitable gift for which the donor receives nothing in exchange is 100 percent tax deductible. The portion of a charitable gift that covers any goods or services received in exchange for a donation is not tax deductible. Examples include, tickets, dinners, golf tournaments, promotional items, subscriptions, dues, etc. The agency can tell you what portion of your gift is considered tax deductible if you are in doubt.

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How is the annual donor limit determined?

The annual donor limit is determined by the actual date of the donor's contribution to the recipient organization. For example, if you make a donation of \$5,000 on Dec 31, 2005 to an eligible institution, and you submit your matching gift form to them in January 2006, if approved, the matching gift award will be "charged" to your 2005 limit.

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How do I submit a request and do I have to submit my match requests online?

There are two ways to submit a request, the preferred method being online. You may use the website at <http://www.easymatch.com/onebeacon> and submit a request electronically, or you can [download](#) the request form from the website and submit it.

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Where can I find blank forms?

Forms are available at your HR offices, or may be [downloaded](#) from this website, or requested via phone at 1-(866) 619-3895.

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When will the organization receive my money?

Matching Gifts disbursements will be made on a quarterly basis to grantee organizations.

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Will I be notified when OneBeacon matches my gift or if it is not approved?

Yes, employee donors are notified of their matched contributions on a quarterly basis. A letter will also be sent if the match has been declined.

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How long do I have to request a match once I've made a donation by check?

Forms must be received within 90 days of the date of payment by check. Gifts registered after that time will not be eligible.

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Why do I have to submit separate forms for each gift made over a period of time to the same institution?

Each gift is a separate transaction. One form per gift helps ensure that every gift donation is matched appropriately. Separate forms also facilitate record keeping and comply with OneBeacon's audit requirements.

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Why is it necessary to provide the exact date of my gift?

OneBeacon requires the exact date of gift in order to determine if the gift is eligible to be matched.

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Can I donate money to organizations located outside the United States?

Organizations must be U.S.-based, but may serve needs worldwide.

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What ID number do I use to log in to the Matching Gift website?

Please use your Company Employee ID number as your user ID. The first time you log in you will be prompted to create a password. Every time you log in, you will need to provide your user ID and personal password to access the site.

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If I have a question about my donation or the program, whom should I contact?

Please contact the program administration office via email at onebeacon@easymatch.com or call 1-(866)-619-3895.

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