



MATCHING GIFT PROGRAM GUIDELINES

The Pacific Life Foundation Matching Gift program supports those organizations that are important to our employees. Each Pacific Life employee may request for their personal donations to be matched up to \$500 to nonprofit organizations and up to \$2,000 to higher education institutions each year.

In honor of Pacific Life's 150th Anniversary in 2018, the Foundation will match employee donations at a rate of 150%. *Example: A \$100 donation will result in a match to the organization of \$150. Only \$100 will be deducted from the employee's maximum match allowance of \$500 or \$2,000.*

Active employees of Pacific Life or its US-based subsidiaries are eligible to participate. Questions regarding the Matching Gift Program should be directed to Marryn Santucci, (949) 219-3787.

Eligible Organizations

- *Colleges and Universities:* Any institution approved by a recognized state, regional, or national accrediting agency is eligible. Such schools must also offer at least a two-year program of college or higher level studies, and be located within the United States or its possessions. The American College is also an eligible institution. *Maximum match is \$2,000 in personal donations per calendar year, per employee.*
- *Nonprofit Organizations:* U.S.-based nonprofit entities with tax-exempt status under Section 501(c)(3) of the Internal Revenue Code. In addition, contributions may be made to K-12 school districts (*designated to a specific school*), accredited K-12 private schools, school PTA's (*membership fees or dues are ineligible for a match*), or K-12 foundations. *Maximum match is \$500 in personal donations per calendar year, per employee.*

Ineligible Organizations

- Any religious, political, veterans, fraternal, or service organizations; alumni or athletic programs/associations; honor societies; United Way chapters; or professional associations - are all ineligible.

Ineligible Contributions

- Contributions to scholarship funds where the scholarship recipient is designated by the donor; contributions to athletic scholarships, departments, programs, booster clubs, or events; payments in lieu of tuition, class/participant/membership dues, books, or other student or alumni fees.
- Pledges of gifts which have not actually been made. Once the gift has been completed, it may be eligible for the program if it meets the guidelines.

Ineligible Contributions (continued)

- Gifts made, in whole or in part, with funds received from other people. This includes funds raised in walkathons and similar fundraising events. Only the donor's personal contribution can be matched. The Pacific Life Foundation match cannot be designated toward a participant's personal fundraising goal.
- Gifts made payable to a nonprofit organization for goods or services provided, regardless of fair market value, such as cookies, event tickets, auction items, or meals; raffles or games of chance, where the employee has a possibility of gain.
- Other ineligible contributions include: dues for clubs; publication subscription fees; church-related financial commitments; insurance premiums; ticket/attendee/participant fees; in-kind donations (clothes, cars, auction items); and other personal obligations.
- Private foundations are not eligible recipients.

The Pacific Life Foundation reserves the right to deny any request deemed ineligible.

How to Apply for a Matching Gift

Employees who wish to have their contributions matched may complete the Matching Gift Program Contribution Form and mail it and their contribution or proof of contribution to the Pacific Life Foundation (700-5), attn: Marryn Santucci.

Employees may also submit their match request online. Please visit Splash for additional information.

Employee contributions must be paid by either check or credit card, be drawn against personal funds, and must be charitable contributions that are fully deductible for federal tax purposes.