



## NONPROFIT MATCHING GIFT PROGRAM GUIDELINES

In an effort to further encourage and support community philanthropy by Pacific Life employees, the *Pacific Life Foundation Nonprofit Matching Gift Program* will provide a match of up to \$2,000 to institutions of higher education, as well as a match of up to \$500 (*per eligible individual, per calendar year*) to eligible nonprofit organizations (*with a \$50 minimum for either type of contribution*). Active employees of Pacific Life or its U.S.-based subsidiaries are eligible to participate. For additional information, please visit [Splash](#).

### 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 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 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, programs, or events; payments in lieu of tuition, class/participant/ membership dues, books, or other student or alumni fees.

### 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.
- 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.
- 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; 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 must complete the Nonprofit 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.

The contribution will be reviewed and forwarded to the designated nonprofit or institution of higher education, along with a letter and matching gift check.

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

Questions regarding the Nonprofit Matching Gift Program should be directed to Marryn Santucci, (949) 219-3787.



# PACIFIC LIFE FOUNDATION

## 2014 NONPROFIT MATCHING GIFT PROGRAM CONTRIBUTION FORM

This form must be completed for **each** contribution (*\$50 minimum*) and signed by the donor (*employee*). In order to be processed during the calendar year, contributions must be received by the Pacific Life Foundation by December 1.

### Donor Information *(employee)*

Company  PL  ACG  PGA

Name \_\_\_\_\_ Work Phone (\_\_\_\_\_) \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

### Recipient Organization Information

Name of College, University, or Nonprofit Organization to receive the contribution:

\_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Phone (\_\_\_\_\_) \_\_\_\_\_ Contact Person *(if applicable and/or known)* \_\_\_\_\_

### Contribution Information

### Check One

My Contribution Amount is \$A .....

credit card information or  receipt or payment  
 check enclosed  confirmation enclosed

The purpose or restriction *(if any)* for which I am making this contribution is *(e.g., a specific department, fund, program, etc.)*

\_\_\_\_\_

Contribution amount that I would like matched by the Pacific Life Foundation *(minimum of \$50)* \$ \_\_\_\_\_

*\* The Pacific Life Foundation will match up to \$2,000 to institutions of higher education plus up to \$500 to other eligible nonprofits, per eligible individual, per calendar year, for all methods of giving combined.*

In order to have your contribution matched, please attach your check *(made payable to your university/nonprofit)*, the organization's credit card contribution form, or your payment confirmation to this application and forward to Marryn Santucci, Public Affairs. Your contribution will be forwarded to the nonprofit agency, along with a letter and matching gift check from the Pacific Life Foundation.

### Donor Verification *(employee signature required)*

This gift *(and its stated value)* which is made from my personal funds or property, fully qualifies as a charitable contribution for personal income tax purposes, and is for the use of the above-named nonprofit organization. I verify that, in return for this contribution, I or any member of my family have not received or will not receive any payment, product, service, or anything else of value whatsoever. By signing this form, I am certifying that the contribution meets all of the requirements listed in the guidelines. I understand that the maximum amount that will be matched is \$2,000 to institutions of higher education plus up to \$500 to other eligible nonprofits, per individual, per calendar year.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Employees: Return completed form and any enclosures to the Pacific Life Foundation  
700 Newport Center Drive (700-5), Newport Beach, CA 92660  
Attn: Marryn Santucci (949) 219-3787**