



PHOENIX

# Matching Gift Program Guidelines

*Phoenix matches employee gifts of \$25 or more to eligible organizations, up to \$2,500 annually.*

## ▶ ELIGIBLE PARTICIPANTS

- Regular full-time employees
- Part-time employees who work a minimum of 19¼ hours hours per week
- Directors of The Phoenix Companies, Inc.

## ▶ ELIGIBLE ORGANIZATIONS

- A charitable organization that is recognized as a 501(c)(3) by the U.S. Internal Revenue Services
- Accredited, nonprofit public and private academic institutions

## ▶ ELIGIBLE GIFTS

Gifts may be in the form of cash, check or credit card.

NOTE: Employees may not receive goods, services or benefits in return for their own or the company's donations. Your gift may be restricted to a particular organization's need or fund, or it may be unrestricted; however, all matching gifts from Phoenix are unrestricted.

## ▶ INELIGIBLE GIFTS

- Tuition, dues or membership fees
- Donations to Phoenix workplace campaigns for the United Way and Arts Council and contributions from a United Way Philanthropy Fund which have already been matched by the company
- Gifts to religious organizations for religious purposes
- Gifts of personal property except publicly traded securities
- Subscription fees for publications or ticket payments

## HOW TO APPLY

- Complete **Part A** of the matching gift application and send the form along with your gift to your charitable organization or educational institution
- The organization will complete **Part B** and mail it back to Phoenix confirming your gift and its nonprofit status

Phoenix matches gifts according to the schedule below:

Match Close*	Match Paid
March 31	April 15
June 30	July 15
September 30	October 15
December 31	January 15

\*The completed form is received from the eligible organization.

The annual \$2,500 limit applies to matches paid within a calendar year.

## FOR MORE INFORMATION, CONTACT:

Babette Mantilla  
 Matching Gift Administrator  
 Phoenix  
 One American Row, PO Box 5056  
 Hartford, CT 06102-5056  
 (860) 403-6340  
 (860) 403-5871 fax  
 babette.mantilla@phoenixwm.com

*The Phoenix Matching Gift Program reserves the right to make final determination as to the eligibility of all donors and recipients and reserves the right to discontinue or amend any part of the Matching Gift Program.*



**MATCHING GIFT PROGRAM APPLICATION**

**PART A - To be completed by the Phoenix Employee or Director**

Please fill out Part A completely and send this form to the eligible educational institution or nonprofit organization with your gift.

Name	Phoenix Employee ID # (if applicable)	Office Phone Number (     )
Email Address	Eligibility Status (please check) <input type="checkbox"/> Employee <input type="checkbox"/> Director	
Name and address of matching gift recipient organization		

Dollar value of gift sent \$	Amount of gift to be matched \$	Date gift sent
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I certify that this gift meets the requirements stipulated in the program guidelines, and that I did not receive goods or services in return for my gift.

Signature	Date
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**PART B - To be completed by Officer of Eligible Educational Institution or Nonprofit Organization**

Please complete Part B and return this form to:  
 The Phoenix Matching Gift Program  
 One American Row, PO Box 5056  
 Hartford CT 06102-5056  
 Attention: Babette Mantilla, H-12  
 Fax: 860-403-5871  
 Email: [babette.mantilla@phoenixwm.com](mailto:babette.mantilla@phoenixwm.com)

Phoenix's matching gift is unrestricted and equal to the amount of an individual's donation (unless otherwise specified by the donor), subject to the limitations defined in the Program Guidelines.

Amount Received \$	Date Received
Donor	
Name of Institution	Phone Number (     )
Address	

I certify that we are an eligible tax exempt organization as stipulated in the Program Guidelines and that no goods or services were provided to the donor.

Federal ID Number	Officer Signature
Date	Officer Name and Title