

## Sammons Financial Group

### **Individual Matching Gift Program**

#### **The Program**

Sammons Financial Group affiliate companies will match dollar-for-dollar individual contributions made by individuals to eligible (1) educational institutions, (2) arts and cultural institutions, (3) medical and healthcare institutions and (4) social services and humanitarian organizations. The purpose of the program is to maximize the dollars given to a broader group of eligible charities that are supported by our associates. The program is designed to match monetary gifts only. The program is available for all part-time or full-time employees of Sammons Financial Group affiliate companies.

\*Temporary employees, interns, consultants or retirees are not eligible.

#### **Eligible Gifts**

All recipient organizations must be located in the U.S. and recognized by the IRS as tax-exempt entities under the Internal Revenue Code section 501(c)(3).

- The minimum gift is \$25 per individual. All gifts will be matched on a one-to-one basis. The maximum gift level per individual may not exceed a total of \$5000 per year.
- Gifts may be made in cash, check, or credit card.
- Gifts must be personal contributions actually made, not merely pledged.

#### **Restrictions**

The following types of organizations or activities will not be eligible or are not covered under the "individual" matching gifts program:

- Political contributions.
- Pledges, tithes or other church-related financial commitments.
- Payment for tuition, books, loans or student fees.
- National or local alumni groups.
- Subscription fees for publications.
- Clubs, fraternities or sororities.
- Gifts in kind. (other than monetary)
- When a gift provides the donor with a benefit, the value of the benefit is deducted from the contribution. An example would be a donation that results in a parking pass or tickets. The remainder may be matched.
- United Way\*
- Pledges for walk-a-thons, bike-a-thons and other fundraising events will not be matched.

- Grouped or pooled donations (e.g., contributions made by a group of employees or other persons, and claimed as one gift from a single eligible donor).
- The Matching Gift Request Form must be completed by the individual donating the funds.

\*Many Sammons Financial Group affiliate companies offer corporate arrangements around matching associate gifts to the United Way and will continue reviewing these arrangements annually.

### **Data Privacy Statement**

Information provided to Sammons Financial Group affiliate companies is processed consistent with the organizational Data Privacy Policy. This information will be used to process the gift and may be used to contact you in the future regarding *Individual Matching Gift Program* updates. Notwithstanding the above disclosures, we will provide personal information when required or permitted by law or for purposes relevant to Corporate Policies. By providing this information you agree to the above uses of this information.

### **Administration**

Individuals requesting a matching gift must obtain a *Request for Matching Funds* form from the Human Resources Department or via the company intranet. This form must accompany your donation and be completed by the eligible charity. Your gift must be a monetary contribution actually made, not pledged.

All matching gift requests will be processed once the completed forms are received and approved in Human Resources. Once approved, Accounts Payable will issue the check to the eligible charity.

The *Individual Matching Gift Program* is administered in the, Sioux Falls South Dakota office. Sammons Financial Group may at any time exercise the right to change or discontinue the *Individual Matching Gift Program*. The interpretation, application and administration of these matching gift provisions shall be determined by Sammons Financial Group, whose decision shall be final.

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