

## DOING GOOD WORKS

# Securian Matching Gift Program

This program is sponsored and administered by Securian Financial Group, Inc. for eligible associates and the associates of its subsidiaries/affiliates who have elected to participate in the program. Employees of participating companies are eligible to participate in the program under the same terms and conditions as if they were Securian associates.

## Together we are better

By serving our community responsibly through philanthropy, associates help carry on the Company's long-standing reputation of being a good neighbor. Through the Matching Gift Program, the Securian Foundation matches associates' contributions to eligible nonprofit educational institutions, arts and cultural organizations, and hospitals.

## Who can request a matching gift?

Funded by the Securian Foundation, the Matching Gift Program can double your financial gifts to nonprofit organizations. You can request a matching gift if you are a Securian:

- Benefits-eligible associate who has completed one year of service;
- Benefits-eligible retiree; or
- Member of the Board of Directors.

## What are the minimum and maximum dollar amounts that Securian matches?

The Foundation will match your contributions of \$35 or more up to a total of \$2,000 per calendar year. You can request matching gifts for more than one organization if each of your contributions is at least \$35 and the total of all contributions does not exceed \$2,000.

## What organizations are eligible?

You can request matching gifts for any of the following types of nonprofit organizations:

- Arts and cultural including museums, theater, opera, orchestras, public radio and television stations, zoological societies, arboretums, united arts funds and libraries in the Twin Cities metro area and in communities where the Company has offices.
- Educational organizations including:
  - Elementary and secondary schools in the U.S. that are fully accredited by the Department of Education.

- Technical and specialized schools; two- and four-year colleges and degree-granting graduate schools that are located in the U.S. and are listed in the Educational Directory of Colleges and Universities or accredited by one of the six nationally recognized regional accrediting commissions.

- Hospitals in the Twin Cities metro area and in communities where the Company has offices.

Eligible organizations must be recognized by the Internal Revenue Service as tax exempt and to which contributions are deductible for income tax purposes.

## What gifts are eligible?

Each gift must be a charitable contribution with no services, benefits or items of value accruing to you or anyone designated by you in return for the contribution or the matching contribution. For example, if you donate \$150 to a cultural organization and \$50 of the gift is considered membership dues with accompanying membership benefits, the dollar amount matched by the Foundation would be \$100.

Your gifts must be paid, not merely pledged. You can pay by cash, check, money order or in marketable securities. Gifts of stock are valued according to the stock exchange listing as of the donation date.

Ineligible gifts include gifts less than \$35; gifts made in lieu of fees or ticket sales; dues paid to alumni associations, rather than to educational institutions; gifts for which reimbursement of any kind is made by another individual or organization; gifts to individuals; gifts as a substitute for tuition payments; and grouping gifts to achieve the \$35 minimum.

The Foundation reserves the right to suspend, change, revoke or terminate the Matching Gift Program at any time; it has no obligation to match donations made after that time. Matching gifts will be paid until the budgeted amount has been reached for the calendar year. The Foundation reserves the right to decline a matching gift to any organization that is controversial, that is not in keeping with corporate diversity strategies or that does not meet Foundation standards.

## Matching Gift Program application procedure

- You complete Part I of the application and mail it with your gift to the organization.
- An authorized representative from the nonprofit organization completes Part II of the application and mails the application to:

**Securian Foundation  
Matching Gift Program, 19-7926  
Securian Financial Group  
400 Robert Street North  
St. Paul, MN 55101-2098**

- The Securian Foundation will send a check to the approved organization and an acknowledgment to you. Please allow three weeks for approval.

Due to holiday season mail delays and year-end budget considerations, applications must be received at the Matching Gift office by December 1 of the year you want your gift matched. Gift applications received after that date will be matched in the following year.

Contact the Securian Foundation, 651-665-3501 or 651-665-7926, for further information regarding the program or the application process.

## Securian's Matching Gift Program application

### I. To be completed by associate/retiree/Board Member

Name: \_\_\_\_\_

Home address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_  Securian associate I.D. number: \_\_\_\_\_

Station number: \_\_\_\_\_  Retiree  Board Member Telephone number: (\_\_\_\_\_) \_\_\_\_\_

Name of eligible organization: \_\_\_\_\_ Amount of gift: \$ \_\_\_\_\_

in cash or (number) of shares/bonds in \_\_\_\_\_ Market value: \_\_\_\_\_

I certify that my gift fully complies with program provisions and that my gift will be used for the direct benefit of the organization with no services, benefits or items of value (other than a tax deduction) accruing to me.

\_\_\_\_\_  
Signature of applicant

\_\_\_\_\_  
Date

### II. To be completed by nonprofit organization

Name of organization: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ Telephone number: (\_\_\_\_\_) \_\_\_\_\_

Federal employer I.D. number: \_\_\_\_ - \_\_\_\_ under IRS Section 501(c)(3).

I have attached evidence of current 501(c)(3) status (application cannot be processed without evidence of current 501(c)(3) status).

Gift amount: \$ \_\_\_\_\_ Tax-deductible gift amount: \$ \_\_\_\_\_

Name of certifying officer: \_\_\_\_\_ Title: \_\_\_\_\_  
(please print)

I verify receipt of the above gift and certify no goods or services have been or will be provided in consideration of it. I also verify this organization has active status under Section 501(c)(3) of the Internal Revenue Code.

\_\_\_\_\_  
Signature of certifying officer

\_\_\_\_\_  
Date

### III. To be completed by Foundation office

Approval: \_\_\_\_\_ Date: \_\_\_\_\_

**Securian Financial Group, Inc.**  
www.securian.com

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