



MATCHING GIFTS PROGRAM

INSTRUCTIONS:

- 1). Verify eligibility criteria and terms of the Program outlined on the attached Guidelines Page.
- 2). Complete Part A, then forward this form to the eligible organization for completion of Part B.

PART A – TO BE COMPLETED BY EMPLOYEE (PRINT)

Date of gift: _____ Organization: _____

Sompo International will match up to \$2000 in donations per individual employee, per calendar year.

Donations must be a minimum of \$50.00

Donation amount: \$ _____

The employee's signature below authorizes the organization named above to report this donation and apply to Sompo International for a matching contribution, and affirms that the donation has been made in accordance with the terms of the Sompo International Matching Gifts Program (see Guidelines Page) in the amount indicated above. **By signing this form, the employee also agrees that they have not submitted more than \$2000 (including this donation) for company match, this calendar year.**

EMPLOYEE NAME (PLEASE PRINT):

HOME ADDRESS:

CITY, STATE, ZIP:

TELEPHONE:

EMPLOYEE SIGNATURE:

PART B – TO BE COMPLETED BY REPRESENTATIVE OF ELIGIBLE ORGANIZATION

The recipient organization must be tax-exempt and meet the eligibility requirements of the Program as explained on the Guidelines Page. If qualified, the organization should complete Part B, and **MUST include a copy of its IRS letter of determination of tax-exempt status/form 501(c)(3). Proof of tax-exempt status MUST be included in order for the Matching Gift to be processed.** Please send completed form via email to: ap@sompo-intl.com

I hereby certify that a donation of \$ _____ has been received by, _____
(Organization)

on behalf of: _____
(Sompo International Employee's Name)

I hereby certify that this gift qualifies to be matched and this organization qualifies to receive a matching contribution from Sompo International under the provisions of this Program as described on the Guidelines Page and, have included a copy of the appropriate IRS letter of determination of tax-exempt status.

SIGNATURE:	DATE:	PHONE NUMBER:
PRINT NAME:	TITLE:	
STREET, CITY, STATE, ZIP:		



SOMPO INTERNATIONAL

EMAIL ADDRESS:

Guidelines Page

The Sompo International Matching Gifts Program (the “Program”) serves as an incentive to regular full time and part time individual employees to support educational institutions and other charitable organizations of a humanitarian nature. Under the Program, Sompo International will match **100%** of individual contributions of employees from a minimum of \$50 up to a maximum of \$2,000 per contributor during a calendar year. **By signing this form, the employee also agrees that they have not submitted more than \$2000 (including this donation) for company match, this calendar year.** In order for Sompo International to provide matching funds, employees and recipient organizations must be eligible as described under ‘Eligible Employees’ or ‘Eligible Organizations’, as applicable.

PROCEDURE

Employees must complete Part A of the form and transmit the form with their gift (check) to the eligible organization. The eligible organization must complete Part B of the form, verifying receipt of the gift, and returns it to Sompo International via email: ap@sompo-intl.com After confirming that the contribution qualifies for matching, Sompo International will forward a check to the eligible organization on behalf of the employee.

Questions of interpretation or administration of the Program shall be determined by Sompo International, guided by the general purposes of the Sompo International Matching Gifts Program. All matching is at the discretion of Sompo International. Sompo International’s determination shall be final. Sompo International may at any time change or discontinue the Program, but this shall not affect employee gifts made prior to any such amendment or discontinuance.

ELIGIBLE EMPLOYEES

Those eligible to participate in the Program are individuals actively employed by Sompo International on a part-time or full time basis or any of its affiliates within the United States as hourly or salaried employees.

ELIGIBLE ORGANIZATIONS

All organizations must be recognized by the Internal Revenue Service as organizations to which contributions are deductible for federal income tax purposes. The financial representative of the organization must attest to the organization’s purpose and tax-exempt status.

Educational institutions eligible to receive funds under the Program include degree-granting graduate and professional schools, universities, two-year and four-year colleges and technical schools, and primary, elementary and secondary schools. To be eligible, a school must be regionally or professionally accredited, be recognized as tax-exempt by the Internal Revenue Service, and be located within the United States or one of its possessions. A tax-exempt alumni fund, foundation, or association which is part of an approved institution or one which transmits all funds directly to the institution will be considered eligible to receive matching gifts if the institution certifies that the gift will be applied directly to support the institution.

Other charities eligible to receive funds under the Program may include corporations, and any fund or foundation organized and operated exclusively for charitable purposes. Civic leagues or organizations not organized for profit but operating exclusively for the promotion of social welfare are also eligible.

ELIGIBLE CONTRIBUTIONS

Sompo International will match the individual contributions made by check from \$50 up to \$2,000 per contributor during a calendar year. The date of the employee’s gift will be used by Sompo International to determine the total contribution(s) of an employee in each calendar year. Sompo International will not match group gifts.



**SOMPO
INTERNATIONAL**

EXCLUSIONS for the Sompso International Matching Gifts Program:

Program will not match payments made by employees for the following: tuition, books, or other student fees; dues; subscriptions; bequests; insurance premium payments; funds pledged but not actually transferred, and any other type of payment not made as a direct contribution to the institution, including courtesy advertising, tickets, products, services, fund-raising dinners or any payment which affords the contributor a personal benefit; or gifts that do not meet the minimum contribution requirements. Gifts other than cash or financial commitments to religious, political or cultural institutions or organizations are excluded however; institutions sponsored by religious organizations for nonsectarian social welfare purposes are acceptable.

Rev April 2017