

Educational Matching Gift Program Application

The strength and vitality of higher education in America needs the financial support of individuals and the business community. Southern Company has a strong commitment to higher education, and matching gifts are an important part of this overall program.

The purpose of the Educational Matching Gift Program is to encourage employees and retirees of Southern Company Services to join the Company in its financial support of institutions of higher education.

WHO CAN PARTICIPATE

- Regular full-time and part-time employees of Southern Company Services
- Retired employees receiving a pension from the company
- Members of the Southern Company Board of Directors

ELIGIBLE INSTITUTIONS

Eligible organizations are: degree-granting universities and four-year colleges located in the United States that are regionally or professionally accredited, and are recognized by the Internal Revenue Code as tax-exempt; and alumni funds, foundations, or associations that are tax-exempt and that certify the gifts will be used for the institution's primary educational objectives.

WHAT CONTRIBUTIONS ARE ELIGIBLE?

- Must be a donation, from the donor's personal funds, which has been paid, and pledged, directly to an approved organization.
- The minimum gift eligible for matching is \$25. For installment gifts, each match request must be submitted separately and meet the \$25 minimum gift requirement.
- The maximum amount matched per donor per calendar year is \$5,000. If the donor makes several contributions, gifts will be matched in the order received, up to the maximum annual donor limit for the calendar year.
- The donor's yearly limit is based on the date of the gift.
- Gifts must be in the form of a check.
- You may be asked to provide proof of your contribution in the form of a cancelled check or bank statement.

WHAT IS NOT ELIGIBLE FOR MATCHING

- Gifts to elementary, secondary, vocational, and junior/community college institutions, or independent scholarship funds.
- Payments of tuition or student expenses, pledges, tithes, or other church-related financial commitments, or any other legal obligation of the donor.
- Dues, gifts, or subscription fees to alumni groups, booster clubs, or similar organizations whose purpose is other than strict contribution to the institution's primary educational objectives.
- Gifts for non-scholastic programs, such as athletics (including athletic scholarships and athletic booster clubs) or stadium construction.
- Gifts in the form of premiums on insurance under which the institution is named as beneficiary.
- Gifts that are made with funds provided in whole or in part to the donor for donation purposed by other individuals, groups or organizations.

HOW THE PROGRAM WORKS

Online:

By Internet: Employees may request matching gifts through a quick, user-friendly, online request process at the Southern Company Services Educational Matching Gift Program web site <http://www.easymatch.com/southernco>.

By Intranet: Go To HR Direct - Employee View - Benefits - Tools and Resources – SCS Educational Matching Gift Program.

Following receipt of the request, the Southern Company Services program administrator will contact the organization to verify receipt of the employee's gift.

Paper:

Employees may request matching gifts through a paper-form process as follows:

Employee Instructions

- Employee completes Section 1 of the form.
- Employee mails the completed form and any other necessary documentation to the organization.

Organization Instructions

- The organization completes Section 2 of the form, verifying that the gift was received.
- The form must be signed by an authorized officer of the organization.
- The organization mails the completed form to the Southern Company Services Educational Matching Gift Program at P.O. Box 7185, Princeton, NJ 08543-7185.

Eligible requests are processed on the following quarterly schedule.

Received By:	3/1	6/1	9/1	12/1
Processed By:	3/31	6/30	9/30	12/31

Matching Gifts must be requested within six months of the gift date. Requests received after that time will not be honored. Receipt of gift will be verified by the organization.

The website contains program related information such as Guidelines, FAQs, as well as the ability to view their personal giving history and search for charitable organizations.

If you have any questions, please contact the Southern Company Services Educational Matching Gift Program via email at southernco@easymatch.com or phone at 1-866-846-9432.

ADMINISTRATIVE CONDITIONS

Southern Company Services reserves the right to interpret, apply, amend or revoke the program and/or the guidelines at any time without prior notice. The policies and procedures described above are not conditions of employment nor are they intended to create or constitute a contract between Southern Company Services and any one or all of its employees.

Organizations approved in the past may not qualify for the Southern Company Services Educational Matching Gift Program in subsequent years if new information is received regarding the loss of their tax status or change in their mission or their programs that indicate the organization now falls outside of the Southern Company Services Educational Matching Gift Program guidelines. However, absent such new information, previously approved organizations are likely to be approved.

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SECTION 1 – TO BE COMPLETED BY THE DONOR

Instructions: Complete Section 1 of this form – one for each gift. *Please print or type.* Send the form and a copy of the program guidelines with your contribution to the recipient institution.

DONOR STATUS

- REGULAR FULL-TIME EMPLOYEE
- REGULAR PART-TIME EMPLOYEE
- RETIREE
- SOUTHERN COMPANY DIRECTOR

DONOR EMPLOYEE SOCIAL SECURITY NUMBER

DONOR NAME

HOME ADDRESS

CITY/STATE/ZIP

BUSINESS TELEPHONE, INCLUDING AREA CODE

E-MAIL ADDRESS

EXACT DATE OF GIFT

\$ _____ \$ _____

AMOUNT OF GIFT (MIN \$25) AMOUNT TO BE MATCHED (MIN \$25)

NAME OF INSTITUTION

ORGANIZATION CITY, STATE

RESTRICTION OR PURPOSE (IF ANY)

- I hereby certify that:
- Neither my family nor I will derive any direct or indirect financial or material benefit from this contribution.
 - I authorize the above-named recipient organization to report this gift to Southern Company Services for the purpose of applying for a matching gift.
 - My gift is a voluntary contribution, that it fully complies with the provisions of the program described herein, and does not represent in anyway a fee for a service or benefit.
 - Any misrepresentation by me of the statements made herein will forfeit my rights to any matching contributions and, in addition, may result in violations of law.
 - I have not been nor will be reimbursed by anyone for this contribution.
 - I have read and understood the guidelines of the Southern Company Services Educational Matching Gift Program.

SIGNATURE OF EMPLOYEE

DATE

**Failure to complete this form will delay processing.*

SECTION 2 – TO BE COMPLETED BY THE INSTITUTION

Instructions: Verify receipt of gift. Complete Section 2 of this form. *Please print or type.* If this is your first matching gift request to the Southern Company Services Educational Matching Gift Program, please enclose a copy of your Internal Revenue Service 501(c)(3) IRS determination letter and a brief description of your organization's primary mission statement or purpose. Forward form to the address printed below.

EMPLOYER IDENTIFICATION NUMBER (EIN)

ORGANIZATION NAME

ADDRESS

CITY/STATE/ZIP

TELEPHONE, INCLUDING AREA CODE FAX, INCLUDING AREA CODE

E-MAIL

WEBSITE ADDRESSES (IF ANY)

DATE GIFT RECEIVED

\$ _____ \$ _____

AMOUNT OF GIFT

TAX DEDUCTIBLE GIFT AMOUNT

I hereby certify that:

- This organization/program meets the eligibility requirements of the Southern Company Services Educational Matching Gift Program.
- That neither the donor nor Southern Company Services will derive any personal material benefit from this gift or match.
- That this organization is in full compliance with the anti-terrorism laws legislated by the USA PATRIOT Act. In addition, by countersigning this Matching Gift Application, I agree that this organization will not promote or engage in violence, terrorism, bigotry or the destruction of any state, nor will it make sub-grants to any entity that engages in these activities.
- That I am authorized to attest to the above statements and have sufficient knowledge to do so.
- I have read and understood the guidelines of the Southern Company Services Educational Matching Gift Program.

AUTHORIZED OFFICER'S NAME (PLEASE PRINT)

TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZED OFFICER

DATE

**Completed forms must be received within six (6) months of the date of gift. Failure to complete this form will delay processing.*

MAIL COMPLETED FORM AND REQUIRED ENCLOSURES TO:
 Southern Company Services Educational Matching Gift Program
 P.O. Box 7185
 Princeton, NJ 08543-7185
Phone: 1-866-846-9432
E-mail: southernco@easymatch.com
Web Site: <http://www.easymatch.com/southernco>