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Program Description

The State Farm Companies Foundation will match eligible donors' charitable contributions (tax deductible portion) to qualified two- and four-year U.S. colleges and universities and Canadian universities. Gifts can be a minimum of \$25 and up to a maximum of \$3,000 per calendar year.

Contributions can be designated to more than one institution, department, or function within that institution. Matches for gifts designated to athletic scholarships are given to the school's general scholarship fund.

Eligible State Farm associates are encouraged to submit an online application to monitor the status of their Matching Gift.

How The Program Works

Eligible gifts are processed and matched to qualifying U.S. colleges or universities and Canadian universities on a quarterly schedule.

If the contribution has been sent to the school:

- **On-line applications must be electronically submitted at www.easymatch.com/statefarmgive within one year of the donor's contribution or**
- **Paper applications* must be received by the Foundation within one year of the donor's contribution.** Complete the Donor's section of the paper application* and submit to

State Farm Companies Foundation Matching Gift Program
P.O. Box 8559
Princeton, NJ 08543-8559

*If submitting a paper application, please provide the organization with the current program guidelines. The college or university must receive your contribution within 5 business days of submitting your paper application.

Required information from the organization must be received within 60 days of date of correspondence from the Foundation.

Program Guidelines

Eligible Participants

- All State Farm® employees, agents, and retirees*
- Members of the State Farm Mutual Automobile Company Board and all affiliate boards

*A retiree is an individual who retired from the Company in an active status and is eligible for retiree benefits other than retirement/Savings and Thrift payments.

Eligibility for the State Farm Companies Foundation Matching Gift Program is determined as of the date of the application.

Spouses, family members, and staff employees of agents are not eligible.

Eligible Institutions

- Degree-granting accredited U.S. colleges, universities, and post-graduate institutions that are nonprofit, tax-exempt private or public colleges or universities under Section 501(c)(3) or Section 170(c)(1) of the U.S. Internal Revenue Code or the tax-exempt foundations of the before-mentioned educational institutions if they are not private foundations because they are described in Code Section 509(a)(1) or 509(a)(2).
- Degree-granting Canadian universities that are affiliated with the Association of Universities and Colleges of Canada (AUCC), are registered with Canada Customs and Revenue Agency as a charitable organization, and have an approved Affidavit on file.

Eligible Contributions

Must be a personal, charitable contribution from the eligible donor's assets that has been paid in one of the following forms:

- Cash, check, money order, or credit card made payable to the college or university
- Securities
- Cash toward permanent life insurance premiums

About Donating Securities

Eligible donors may contribute mutual fund units and securities traded on the New York Stock Exchange, American Stock Exchange, NASDAQ National Market, or Toronto Stock Exchange.

- The eligible donor must be the sole owner or have final authority to transfer ownership of the security or mutual fund unit to the eligible institution.
- Ownership must be signed over to the eligible institution.

- The exact value of donated securities or mutual fund units will be based on the closing market price on the date the transfer is complete.

About Life Insurance Gifts

The Foundation will match cash contributions toward permanent life insurance policy premiums on new or existing policies, including universal life, when:

- The policy is on the life of an eligible donor only.
- The eligible institution is the owner and sole beneficiary.

The eligible institution is responsible for making the premium payments.

Ineligible Contributions

- Bequests
- Dues to alumni groups or clubs
- Contributions designated to clubs and similar groups, athletic teams, fraternities, or sororities*
- Contributions or pooled contributions made by an eligible donor on behalf of ineligible donor(s)
- Magazine or newsletter subscriptions
- Payments for books, loans, or student fees
- Payments that cover the cost of ticket purchases or that allow the donor to purchase special seating or parking passes for events or similar “perks”
- Tuition payments or contributions that reduce tuition
- Unpaid, pledged contributions

*Contributions to qualified institutions for athletic teams and clubs are generally not eligible for a matching gift. However, contributions to qualified institutions designated to clubs or similar groups raising funds to benefit a department's education program, capital contributions, or provide for scholarships, are eligible for a matching gift.

Contributions to athletic scholarships are eligible for a matching gift, but the match from State Farm Companies Foundation will be paid to the school's general scholarship fund.

Matching Gift Restrictions

The matching gift from State Farm Companies Foundation may not lead to the donor receiving any goods, services, or benefits with a monetary value, or that would not be available to the donor solely based on the donor's individual contribution.

For example, a donor makes a personal contribution to a university and participates in the Matching Gift Program. As a result of their personal contribution, the donor receives a parking pass for the basketball season. Coupled with the Foundation match, the donor is recognized as a premium giver and qualifies for a dinner.

*The donor may accept the parking pass for basketball games since it is awarded based on the personal contribution, but must reduce the amount of the Matching Gift request by the value of the parking pass.

*The donor may be recognized as a premium giver, but may not accept the dinner because qualification was based in part on the Foundation's gift.

The State Farm Companies Foundation and State Farm value inclusiveness and diversity. Therefore, charitable funding is intended to advance access, equity, and inclusiveness while discouraging harmful discrimination based on age, political affiliation, race, national origin, ethnicity, gender, disability, sexual orientation or identity, or religious beliefs.

Through its various programs, the Foundation provides grants to other tax-exempt organizations. The Foundation expects these organizations and their leadership to comply with all laws, to follow high ethical standards, and to have strong internal controls. This includes:

- Mission statement outlining purpose and goals
- Compliance with established guidelines for its charitable purposes
- Business practices that monitor and enforce ethical standards of all persons associated with the organization
- Satisfy appropriate background checks when children are included in programs
- Good stewards of grant funds through internal controls and oversight
- Adequate safeguards to avoid conflicts of interest

Questions

If you have questions, call the Foundation toll-free at (866) 604-5480 or e-mail statefarm@easymatch.com.

The State Farm Companies Foundation, in its discretion, reserves the right to decide whether a Matching Gift or Good Neighbor Grant[®] will be made. The Foundation reserves the right to discontinue or change the Matching Gift or Good Neighbor Grant programs at any time without notice.