



# Matching Gifts Request Form

## Part A – Donor Section

- Person making donation fills out **Part A**, then
- Sends this form to the Recipient Organization (i.e. the recipient of your donation)
- Recipient Organization will complete **Part B** and return this form to Verisk Analytics

**NOTE: Minimum donation must be \$50 or more.**

<b>DONOR INFORMATION – PART A</b>
<b>Active Employees</b> Employee ID: _____  <i>*If donor is the spouse/domestic partner of an active employee please enter employee ID above.</i>
<b>Retirees and Directors</b> Social Security Number: _____  <i>*If donor is the spouse/domestic partner of a retiree or Director please enter the social security number of the retiree or Director above.</i>
<u>Donor Status</u> <input type="checkbox"/> Employee <input type="checkbox"/> Employee Spouse/Domestic Partner <input type="checkbox"/> Retiree <input type="checkbox"/> Retiree Spouse/Domestic Partner <input type="checkbox"/> Director <input type="checkbox"/> Director Spouse/Domestic Partner
Donor Name
Home Address
City/State/Zip
Phone
E-mail Address
Recipient Organization Name
City, State
Program Designation ( if any)
Date of Gift
Amount of Gift
Type of Gift (select one) <input type="checkbox"/> Cash/Check <input type="checkbox"/> Credit Card <input type="checkbox"/> Securities
If Securities
Name of Security
Number of Shares
Date of Transfer

**Certification Statement:** I hereby certify that the information I have provided is complete and correct and that my gift hereby complies with the program provisions stated on this form.

Donor Signature
Date

## Part B – Recipient Organization

- Please complete the following information and forward this form to the address below.
- **EACH MATCHING GIFT REQUEST FORM MUST BE ACCOMPANIED BY YOUR ORGANIZATION'S 501(c) 3 LETTER IN ORDER TO BE PROCESSED.**

<b>RECIPIENT INFORMATION – PART B</b>
<b>EIN:</b>
Organization Name
Mailing Address
City/State/Zip
Phone
Fax
E-mail Address
Website Address
<b>Gift Amount</b>
Tax Deductible Gift Amount

**Certification Statement:** I hereby certify the receipt of the gift described herein, the eligibility of this organization, and that the use of these funds will support the primary aims of this organization. I attest that they will not be used to pay any fees or in lieu of tuition.

Name of Organization Representative
Title
Signature
Date

Verisk Analytics Matching Gifts Program  
 Human Resources Dept. / Att: Kei Andersen  
 545 Washington Boulevard  
 Jersey City, NJ 07310-1686  
 Fax: 201-469-4141

## **Forms that are faxed do not have to be mailed in**

For questions about this program please contact:  
 Kei Andersen, Human Resources Dept. at  
 201-469-2507 or kei.andersen@iso.com.

*\* Verisk Analytics reserves the right to modify or discontinue this program at any time. The interpretation, application and administration of the provisions of this program shall be determined solely by Verisk, and its decisions shall be final.*



# Matching Gifts Program Guidelines

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## Purpose

The purpose of the Verisk Matching Gifts Program is to encourage support of certain non-profit educational or charitable organizations by magnifying personal gifts by employees, directors and retirees.

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## Who is eligible to participate?

Full-time and part-time active Verisk employees, directors and retirees, and their spouses and domestic partners are eligible to participate in the matching gifts program

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## Eligible Institutions

Eligible organizations must be located in the United States or one of its possessions and be recognized as tax-exempt, non-profit educational or charitable organizations as defined under Section 501(c)(3) of the U.S. Internal Revenue Code. In addition, an eligible educational organization must be a secondary school, degree-granting two- or four-year private or public college or university, graduate school, or law, medical or dental school accredited by a recognized accrediting association.

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## What is an eligible gift?

Gifts must be actual contributions (not pledges), paid by check, cash, credit card or publicly traded securities (valued at the closing price on the day the gift is made) from personal funds.

The minimum gift under the program is \$50. The annual limit (which may be comprised of one or more gifts) for active employees and directors is \$5,000\*; for retirees, \$2,500\*.

\*Donations made by a spouse/domestic partner AND an employee /director/retiree cannot exceed the noted maximums combined.

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## What gifts are ineligible?

The following gifts are not eligible for matching under the program:

Gifts which afford the contributor a personal benefit in return for the donation.

- In-kind gifts, life income trusts, or real estate.
- Indirect contributions to eligible non-profit organizations (tuition, student fees and loans, dues, insurance premium payments, etc.)
- Gifts by payroll deduction.
- Gifts for religious organizations, unless the specific program is nondenominational in nature and benefits a broad range of the community (e.g., soup kitchen, homeless shelter).

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## How much of an eligible participant's gift is matched?

Eligible gifts will be matched up to 100% if the annual program budget allows. If overall participant demand exceeds the budget, prorated adjustments in the matching amounts awarded to eligible organizations will be made. For example, if eligible gifts in a given year exceed the program budget by 25%, the gifts will be matched at 75% that year.

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## When are matching gifts paid?

**Matching gift checks are sent out annually after year-end.**

Eligible gifts received and confirmed by November 16, 2012 will be sent out early in the new year.

Eligible gifts received and confirmed **after our annual November deadline** will be included in the next year's matching gifts program.

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## How may I participate?

You may participate by filling out a **Verisk Analytics Matching Gifts request form** and sending it to the eligible institution of your choice for return to:

**Verisk Analytics Matching Gifts Program  
Human Resources Dept / Att: Kei Andersen  
545 Washington Boulevard  
Jersey City, NJ 07310-1686  
FAX: 201-469-4141**

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## Questions about the Verisk Matching Gifts Program

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Human Resources Dept / Att: Kei Andersen  
545 Washington Boulevard  
Jersey City, NJ 07310-1686**

You may also contact Kei Andersen at 201-469-2507 or e-mail [kei.andersen@iso.com](mailto:kei.andersen@iso.com)