

# The Prudential Foundation Matching Gifts Program

## Program Guidelines

Prudential and The Prudential Foundation are pleased to join in supporting the nonprofit organizations that are special to you. Thanks for helping to make our communities better.

### Matching Funds Available Through Payroll Deduction or Direct Giving

The Foundation will match gifts to eligible nonprofit organizations at a ratio of 1 to 1. However, the first \$100 in direct gifts such as by check or credit card (does not apply to payroll deduction) received by the Prudential Matching Gifts Center, per individual, per year, will be matched at a 2-to-1 ratio.

The minimum gift eligible for matching is \$25 for contributions made by check, credit card, securities or life insurance. The minimum gift eligible for matching made by payroll deduction is \$1.00 per pay period. The maximum amount of gifts eligible to be matched by the Foundation is \$5,000 per individual, per calendar year, for all methods of giving combined. Gifts must qualify as charitable contributions under the U.S. Internal Revenue Code.

Gifts must be made from the individual's own funds not merely pledged, and must pass to the organization without reduction in value. *Only the tax-deductible portion of a contribution will be matched.*

To qualify for a match through direct giving, your request must be received at the Prudential Foundation Matching Gifts Center no later than one year after a gift has been made.

The minimum disbursement threshold is \$25 per agency, for both payroll funds and Foundation matching. At the end of the month, if the total payroll deduction funds from all donors for an agency are less than \$25, the funds are held until the accumulated amount reaches the minimum threshold or payroll deduction for the pledge year is completed. Setting this minimum reduces administrative expenses for both The Prudential Foundation and the recipient agency(ies).

### Eligible Participants

- Active full-time employees of Prudential Financial and participating subsidiaries
- Retired employees (direct giving only)
- Prudential part-time employees (20 hours or more)
- Current and retired members of the Board of Directors

### Ineligible Donors

- Spouses or relatives of employees or surviving spouses of deceased employees
- Inactive employees on leaves of absence or long-term disability

### Eligible Organizations

The philanthropic programs of The Prudential Foundation and of The Prudential Insurance Company of America and its subsidiaries support nonprofit, charitable organizations and programs whose mission and operations are broad and non-discriminatory or whose activities address social needs or benefit underserved groups and communities. The right of religious

organizations to maintain their identity is respected, but only their outreach efforts in the broader community are eligible to participate in the Foundation and Company programs. Most nonprofit organizations are eligible donees, provided they are located in the United States or one of its possessions and recognized by the Internal Revenue Service as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS Code or as an instrumentality of a federal, state or local government as provided by Section 170(c)(1) of the Code.

The donor's gift may be designated for eligible restricted funds including departments, libraries, building or other capital fundraising drives, scholarship funds, and class or alumni drives. However, the Foundation's matching portion will be unrestricted.

### Ineligible Organizations

Any religious, political, veterans, fraternal or service organizations; alumni or athletic associations; honor societies; or professional associations are ineligible.

### What Types of Gifts Qualify?

Personal check, money order, cashier's check or credit card payment gifts must be drawn against personal funds.

The following non-cash gifts, with the specified documentation sent to the Prudential Foundation Matching Gifts Center:

### Securities (stocks or bonds)

Donor must arrange for the transfer of ownership. The recipient organization must provide the Prudential Foundation Matching Gifts Center with evidence of transfer of ownership a statement of value. Securities will be valued based on the close price on the date of the transfer.

### Individual life insurance policy

A statement from the insurance company indicating the policy number, the type of policy, the face value, the net cash value, if any, and the date the policy was irrevocably assigned to the organization must be provided.

### Ineligible Gifts

- Contributions to scholarship funds where the scholarship recipient is designated by the donor; contributions in support of athletic programs, or athletic scholarships; payments in lieu of tuition, class dues, books or other student or alumni fees.
- Gifts made to or through third parties. This includes gifts made using family trusts, donor-advised funds at community foundations and any other contribution, which is not the direct gift of the donor's personal funds to the recipient organization.
- Gifts made, in whole or in part, with funds received from other people. This includes funds raised in walkathons and similar fundraising events. Only the donor's personal contribution can be matched.

- Gifts, which have not actually been made, for example, pledges. Once the gift has been completed, it is eligible for the program if it meets the guidelines.
- Other ineligible restricted funds include: dues for clubs; publication subscription fees; gifts to social, religious or political groups; gifts to honorary societies; bequests; church-related financial commitments; athletic programs; and other personal obligations.
- Private foundations are not eligible donees.

### Matching Gifts Timetable

#### Direct Giving:

When using the web based online tool, matching gift requests are forwarded electronically to the Prudential Foundation Matching Gifts Center. The nonprofit organization is then contacted for confirmation of the gift. Please note, when using the web based online tool, matching requests must be both submitted and confirmed by the recipient organization in order to be eligible for matching by The Prudential Foundation. When using the paper form, donor should complete Section I and forward with your initial contribution directly to the non-profit organization. The nonprofit organization will complete Section II and send the completed form to The Prudential Foundation Matching Gift Center. Payments by The Prudential Foundation will be made on the following schedule:

#### Direct gifts received and confirmed by:

- March 15 will be processed by April 30;
- June 15 will be processed by July 30;
- September 15 will be processed by October 30;
- December 15 will be processed by January 30 of the following year.

#### Payroll Deduction:

When contributing by payroll deduction, donor's funds are distributed on a monthly basis to the nonprofit organization. The Prudential Foundation match is distributed in January of the year following. Requested changes to your Payroll deduction are processed at the end of each month and become effective in a pay period during the following month.

The Prudential Foundation reserves the right to change or discontinue this program at any time. Decisions of the Foundation regarding the interpretation and administration of the Matching Gifts Program and the eligibility of organizations or gifts are final.

#### For further information, please contact:

The Prudential Matching Gifts Center  
P.O. Box 7184  
Princeton, NJ 08543-7184  
Tel: 1-(800) 554-7846, Fax: 1-(609) 799-8019  
Email : [prudential@easymatch.com](mailto:prudential@easymatch.com)  
Web : [www.easymatch.com/prudential](http://www.easymatch.com/prudential)



**Prudential**  
Foundation

# The Prudential Foundation Matching Gifts Program



Complete this portion for payroll deduction only

**New, On-Line Giving!** Submit your request electronically at [www.easymatch.com/Prudential](http://www.easymatch.com/Prudential)

## Employee Information (Please print.)

Name:	Employee ID*: <small>*This ID number is found on each salary payment stub</small>
Home Address	City, State, Zip
E-mail	Daytime Telephone No.

## Type of Transaction

- New** Payroll Deduction(s) - This action will cancel all any existing payroll deductions that you already have and add "new" ones.
- Add** New Payroll Deduction(s) to Existing Payroll Gift(s) - This action will retain all pledges already being deducted and ADD the pledge listed below. Please note that there is a limit of 4 deductions at any one time.
- Change** the Payroll Deduction(s) Amount for an Existing Payroll Gift - This action will simply raise or lower the per period amount withheld to the amount shown below for the specific organization listed. It will not alter the amount withheld for any other pledges that you may have.
- Cancel** Existing Payroll Gift - This action will cancel only the specific pledge that you list. If you wish to cancel more than one of your current pledges, list each individually.

## Charity Designation

Enter information for the nonprofit organization(s) and enter the amount per pay period you wish to donate with a minimum at least \$1 per charity, per pay period. A maximum limit of four designations is allowed at any given time. Payroll deduction will continue until a change or cancellation is requested. Unless you specify otherwise, your entire contribution will be matched up to each donor's maximum limit of \$5,000 per eligible individual, per calendar year, for all methods of giving combined. Use the amount to be matched column if you want other than 100% to be matched. Please provide as much information relating to the organization as possible to avoid delays in processing.

	Payroll Amount Per Pay Period	Amount To Be Matched
<input type="checkbox"/> Organization Name: _____ Address: _____ City/State/Zip: _____ Employer Identification Number (if known): _____ Telephone: _____ Gift Purpose (if any): _____	\$ _____ .00	\$ _____ .00
	<b>Please check one:</b> <input type="checkbox"/> New <input type="checkbox"/> Add <input type="checkbox"/> Cancel <input type="checkbox"/> Change	
<input type="checkbox"/> Organization Name: _____ Address: _____ City/State/Zip: _____ Employer Identification Number (if known): _____ Telephone: _____ Gift Purpose (if any): _____	\$ _____ .00	\$ _____ .00
	<b>Please check one:</b> <input type="checkbox"/> New <input type="checkbox"/> Add <input type="checkbox"/> Cancel <input type="checkbox"/> Change	
<input type="checkbox"/> Organization Name: _____ Address: _____ City/State/Zip: _____ Employer Identification Number (if known): _____ Telephone: _____ Gift Purpose (if any): _____	\$ _____ .00	\$ _____ .00
	<b>Please check one:</b> <input type="checkbox"/> New <input type="checkbox"/> Add <input type="checkbox"/> Cancel <input type="checkbox"/> Change	
<input type="checkbox"/> Organization Name: _____ Address: _____ City/State/Zip: _____ Employer Identification Number (if known): _____ Telephone: _____ Gift Purpose (if any): _____	\$ _____ .00	\$ _____ .00
	<b>Please check one:</b> <input type="checkbox"/> New <input type="checkbox"/> Add <input type="checkbox"/> Cancel <input type="checkbox"/> Change	

## Donor Recognition

Please select one of the following options. Please note, if you elect "name only" or "remain anonymous," the recipient organization will not be able to send you an acknowledgement. If you do not make a selection, the default will be "name only."

- Release my name and home address to the organization
- Release my name only
- I wish to remain anonymous

### Donor Verification (Signature Required)

This gift (and its stated value), which is made from my personal funds or property, fully qualifies as a charitable donation for personal income tax purposes, and is for the use of the above-named organization(s). I understand The Prudential Foundation's matching gift is for the unrestricted use of the organization and not for any specific purpose designated by me, including the cancellation of any personal obligation. I verify that, in return for this gift, neither I nor a member of my family has not received or will not receive any payment, product, service or anything else of value whatsoever. By signing this form, I am certifying that the gift meets all of the requirements listed in the Guidelines. I understand that the maximum amount that will be matched is \$5,000 per individual, per calendar year, for all methods of giving combined.

Signature of Donor \_\_\_\_\_

Date \_\_\_\_\_

Return this form to: Prudential Matching Gifts Program, P.O. Box 7184, Princeton, NJ 08543-7184  
Tel: 1-800-554-7846

# The Prudential Foundation Matching Gifts Program



Complete this portion for **direct giving** by check

**New, On-Line Giving!** Submit your request electronically at [www.easymatch.com/Prudential](http://www.easymatch.com/Prudential)  
(For donations by credit card, securities or life insurance, please complete your request for Matching on-line at [www.easymatch.com/prudential](http://www.easymatch.com/prudential))

## Section I: To be completed by the donor (Please print.)

**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 organization.

### Donor

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

Employee ID\* or Retiree ID\*\*:

*\*This ID number is found on each salary or pension payment stub*

*\*\*Retirees use first two letters of last name, birth month and day (MMDD), and last four digits in Social Security #.*

Check One:  Employee  Retiree  Board Director  Retired Board Director

Home Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home Telephone No. \_\_\_\_\_

E-mail \_\_\_\_\_

Work Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Work Telephone No. \_\_\_\_\_

### Recipient Organization

Official Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

### Your Gift

Gift Purpose (if any) \_\_\_\_\_

Exact Date of Gift \_\_\_\_\_

Tax-Deductible Gift Amount (min \$25): \$ \_\_\_\_\_

Gift Amount To Be Matched (min \$25) \$ \_\_\_\_\_

\*The Prudential Foundation will match up to \$5,000 per eligible individual, per calendar year, for all methods of giving combined.

### Donor Verification (Signature Required)

This gift (and its stated value), which is made from my personal funds or property, fully qualifies as a charitable donation for personal income tax purposes, and is for the use of the above-named organization(s). I understand The Prudential Foundation's matching gift is for the unrestricted use of the organization and not for any specific purpose designated by me, including the cancellation of any personal obligation. I verify that, in return for this gift, nor I or a member of my family have not received or will not receive any payment, product, service or anything else of value whatsoever. By signing this form, I am certifying that the gift meets all of the requirements listed in the Guidelines. I understand that the maximum amount that will be matched is \$5,000 per individual, per calendar year, for all methods of giving combined.

Signature of Donor \_\_\_\_\_

Date \_\_\_\_\_

## Section II To be completed by the recipient organization (Please print.)

**Recipient Organization:** Verify receipt of gift. Complete Section 2 of this form. *Please print or type.* If this is your first matching gift request to the Prudential Foundation Matching Gifts 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) \_\_\_\_\_

Fax No. \_\_\_\_\_

Organization Name \_\_\_\_\_

E-mail \_\_\_\_\_

Address \_\_\_\_\_

Website Addresses (if any) \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Exact Date of Gift \_\_\_\_\_

Telephone No. \_\_\_\_\_

Gift Amount: \$ \_\_\_\_\_

Tax Deductible Gift Amount Received: \$ \_\_\_\_\_

I certify that the above-indicated gift has been received, and it will be used to support the primary objectives of the organization, which is classified as a tax-exempt organization under section 501(c)(3) of the U.S. Internal Revenue Code, or is a governmental entity or agency, and: (a) this organization's mission and operations are broad and non-discriminatory or its activities address social needs or benefit underserved groups and communities; (b) this is an eligible organization; (c) the gift meets all of the requirements listed in the Guidelines; (d) The Prudential Foundation received no goods, services or other quid pro as defined in the relevant IRS rules and regulations. Proof of tax-exempt status is enclosed if this is the initial request to The Prudential Foundation Matching Gifts Program.

Name \_\_\_\_\_

Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Return this form to:**  
Prudential Matching Gifts Program  
P.O. Box 7184  
Princeton, NJ 08543-7184  
Tel: 1-800-554-7846