

# *The CIGNA Matching Gifts Program*

## **Program Description and Application Form**

### **THE CIGNA MATCHING GIFTS PROGRAM**

Many employees of CIGNA companies and current members of the CIGNA Corporation Board of Directors contribute financial support to EDUCATIONAL INSTITUTIONS AND ARTS AND CULTURAL ORGANIZATIONS. CIGNA, through its Foundation, provides a means for these individuals to direct a significant segment of its charitable giving by matching their qualifying contributions on a one-to-one basis, up to a donor maximum of \$5,000 per calendar year. CIGNA considers its matching gifts to be unrestricted funds.

### **DONOR ELIGIBILITY**

A participant must be an employee of CIGNA Corporation or any of its companies (including full-time career agents), who has been employed for at least one year prior to the date of the gift and works no fewer than 20 hours per week. Current members of the CIGNA Corporation Board of Directors also are eligible to participate. Surviving spouses are not eligible.

### **RECIPIENT ELIGIBILITY**

Institutions must be physically located in the United States, and recognized by the U.S. Treasury Department as tax exempt under Section 501(c)(3) or Section 170(b) of the Internal Revenue Code, to be eligible for consideration under the Matching Gifts Program.

Both the original gift and the CIGNA matching gift must be used for the sole benefit of the eligible institution.

Institutions eligible for matching gifts are STRICTLY LIMITED TO:

- State-licensed primary and secondary schools of special education, for children with physical or mental handicaps, as listed in the *Directory for Exceptional Children*, Porter Sargent Publishers, Inc.
- Private and public institutions of higher learning listed as accredited institutions in the *Handbook of Accredited Institutions of Postsecondary Education*, American Council on Education.
- Arts and cultural organizations: museums; art galleries; orchestras; theaters; dance, opera or choral groups; arts or cultural centers; public television or radio stations; non-academic libraries; zoos; botanical gardens; or historic preservation and restoration associations.

### **EXCLUSIONS**

Among the institutions excluded from matching gifts are:

- Medical, human and social service or research organizations, including hospitals.
- Social and fraternal organizations and their scholarship programs.
- Environmental, animal rights and other advocacy organizations.
- Organizations, such as councils on the arts, that provide funding to other cultural or educational institutions.

The Program will not match tuition or dues payments, memberships, fees for services, pledges, contributions made in installment payments, bequests, gifts of personal property except publicly traded securities, subscription fees for publications or ticket payments.

### **DISBURSEMENTS**

The CIGNA Matching Gifts Program is on a calendar-year basis and is divided into two disbursement cycles. Institutions must ensure that their verified application reaches the Program by June 30 for the first cycle, and by December 31 for the second cycle. Applications received on or after July 1 or January 1 will be matched in the next disbursement cycle. For donors wishing to have their gifts charged against the current annual \$5,000 maximum, the Program must receive the verified application form by December 31 of the calendar year.

Matching gifts are not made retroactively. Applications must be submitted by the donor to the institution at the time the gift is made.

The minimum amount eligible for a matching gift is \$25. Only the tax-deductible portion of the donor's gift is eligible for matching. Gifts must be made directly by the donor to the eligible institution. Gifts made through donor-directed charitable funds or other third parties (such as United Way) are ineligible. Contributions can be made to more than one eligible institution and can be either cash or publicly traded securities. The value of donated securities to be matched by CIGNA shall be equal to the closing bid price or established market value on the date ownership of the securities passes to the recipient organization. The maximum amount CIGNA will match on the gift of securities is \$5,000, even if the market value or closing bid price exceeds that amount.

Matching gifts are contributions from CIGNA and not from the individual whose contribution is matched. The donor is to receive no benefit from the matching gift.

CIGNA reserves the right to discontinue or amend any part of the Matching Gifts Program.

Further, the CIGNA Matching Gifts Program reserves the right to make final determination as to the eligibility of all matching gifts, donors and recipients.

**ANY QUESTIONS CONCERNING THE MATCHING GIFTS PROGRAM SHOULD BE DIRECTED TO:**

### **The CIGNA Matching Gifts Program**

#### **CIGNA**

1601 Chestnut Street, TL06B

Philadelphia, PA 19192-2066

(215) 761-4884

# Application for the CIGNA Matching Gifts Program



Please fill out all sections completely and accurately. The Program cannot be responsible for returning or processing incomplete or inaccurate forms.

For Program Use Only	Date Received:	Organization Code:	Transaction #:
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**Part A: Donor Information**

Check Box if Yes:  Have you applied for Matching Gifts before?

For previous applicants:  Has your home address changed?  Has your work address changed?  Has your name changed?

To be completed by donor. Please print or type.

Send form to recipient organization with your gift.

Last Name:	First Name:	Middle:	<input type="radio"/> Mr. <input type="radio"/> Ms. <input type="radio"/> Mrs.
<b>EMPLOYEE ID.:</b>		<b>DATE HIRED</b> (Month, Day, Year) :	
<i>CIGNA Division (check one): (Division/Office information for current employees only.)</i>			
<input type="radio"/> CHC	<input type="radio"/> R&IS	<input type="radio"/> Reins.	<input type="radio"/> IM <input type="radio"/> FMS
<input type="radio"/> HR&S	<input type="radio"/> L&PA	<input type="radio"/> Int'l	<input type="radio"/> Group
Office Address:		Routing Code:	
City:		State:	Zip Code:
Telephone Number:		E-Mail:	
Donor Status: <input type="radio"/> Employee <input type="radio"/> Member, CIGNA Corporation Board of Directors			
Home/Mailing Address:			
City:		State:	Zip Code:
<b>Organization to which you are giving:</b>			
Organization Type: <input type="radio"/> Special Ed. <input type="radio"/> Higher Ed. <input type="radio"/> Arts & Culture			
If marketable securities, name:			
No. of Shares:		Per Share Price: \$	
<b>Donor Gift Amount: \$</b>			

**Certification:** I certify that my gift is a voluntary contribution made directly by me to a qualifying educational or arts and cultural organization as defined under RECIPIENT ELIGIBILITY. I verify that these are my own resources and not the gifts or loans of any other person or organization. My gift is not tuition or other payment made because I expect some monetary or other benefit to be given to me, or to any person or organization affiliated with me. Furthermore, I certify that I meet the donor eligibility requirements set forth in this brochure. *I understand that matching gifts are contributions from CIGNA and are not from me.* In addition, my gift will not be used for religious or political purposes, or to fulfill a religious or political commitment.

**SIGNATURE:** \_\_\_\_\_ **GIFT DATE:** \_\_\_\_\_

**Part B: Recipient Information**

To be completed by a fiduciary of the recipient. Please print or type.

Name of Organization:
Address:
City: State: Zip Code:

**Verification:** I verify receipt of the gift described in Part A, whose tax-deductible value is \$ \_\_\_\_\_, and certify that this organization is a nonprofit public institution/organization, and that contributions to it are tax deductible under Sections 501(c)(3) and 170(b) of the Internal Revenue Code of the United States. Moreover, this institution/organization is not a private foundation as defined in Section 509(a) of the Internal Revenue Code, nor does it discriminate on the basis of race, sex, color or creed. Furthermore, I certify that this gift does not represent in any way tuition or payment in exchange for, or in expectation of, monetary or other benefits; nor is it intended for political purposes, or to fulfill a religious or political commitment.

**SIGNATURE:** \_\_\_\_\_ **DATE SIGNED:** \_\_\_\_\_

**Typed Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**INFORMATION FOR ORGANIZATIONS:** The CIGNA Matching Gifts Program disburses twice each year. Verified records must reach the Program by June 30 for the first payment cycle, and by December 31 for the second cycle. All applications received after these dates will be considered for the following disbursement cycle. Gifts are not matched retroactively. The Program reserves the right to make final determination as to the eligibility of all gift applications.

**PLEASE RETURN TO:**

The CIGNA Matching Gifts Program, CIGNA; 1601 Chestnut Street, TL06B; Philadelphia, PA 19192-2066