



Erie Insurance®

# MATCHING GIFTS FORM

TO BE COMPLETED BY EMPLOYEE/DIRECTOR

**INSTRUCTIONS TO EMPLOYEE/DIRECTOR:**

- Carefully review Matching Gifts Program Rules and Instructions
- Complete section marked "To be Completed by Employee/Director"
- Print and send completed form, Matching Gifts Program Rules & Instructions and your donation to the Institution or Organization

EMPLOYEE OR DIRECTOR NAME		EMPLOYEE NUMBER	
<input type="checkbox"/> DIVISION	DEPARTMENT		
<input type="checkbox"/> FIELD OFFICE	SECTION		
<input type="checkbox"/> DIRECTOR	UNIT		
OFFICE TELEPHONE AND EXTENSION NUMBER ( ) -	HOME PHONE NUMBER ( ) -		
HOME ADDRESS	CITY	STATE	ZIP CODE
FORM OF DONATION <input type="checkbox"/> Cash or Check <input type="checkbox"/> Securities	DONATION AMOUNT \$	EXACT DATE OF DONATION / /	
NAME OF INSTITUTION			
NAME OF SPECIFIC DEPARTMENT, FOUNDATION, FUND, etc. (NOTE: IF NOT SPECIFIED, THE ERIE'S GIFT SHALL REMAIN UNRESTRICTED.)			
I hereby certify that I have read the guidelines set forth by the Matching Gifts Program and that this donation is fully eligible under the guidelines and does not represent a payment directly or indirectly for services.			
Employee or Director Signature _____			Date _____

TO BE COMPLETED BY INSTITUTION OR ORGANIZATION

**INSTRUCTIONS TO AUTHORIZED FINANCIAL OFFICER OF INSTITUTION OR ORGANIZATION:**

- Complete application
- Print in ink or type

3. Return to: **ERIE INSURANCE**  
Matching Gifts Program  
100 Erie Insurance Place  
Erie, PA 16530

EXACT NAME OF INSTITUTION OR ORGANIZATION AS REGISTERED WITH THE IRS:	EMPLOYER IDENTIFICATION NUMBER (EIN)
ADDRESS	CITY STATE ZIP CODE
ELIGIBLE 501(c)(3) ORGANIZATIONS OR EDUCATIONAL INSTITUTIONS INCLUDE:	
<ul style="list-style-type: none"> <li>All public and private two or four year degree-granting colleges, universities, graduate, professional or technical schools located in the U.S. or one of its possessions and accredited by an accrediting agency that is recognized by the U.S. Office of Education.</li> <li>Donations to tax-exempt alumni funds, foundations, and associations whose exclusive purpose is the support of one of these educational institutions.</li> <li>All nonprofit organizations located in the U.S. or one of its possessions and recognized by the IRS as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS Code.</li> </ul>	
Indicate below the Type of 501(c)(3) Organization or Educational Institution:	
<input type="checkbox"/> Education	<input type="checkbox"/> Arts & Culture
<input type="checkbox"/> Health & Human Services	<input type="checkbox"/> Insurance, Safety & Disaster Relief
<input type="checkbox"/> Civic & Community	
I hereby certify that a donation of \$ _____ has been received on ____/____/____ from the donor indicated. I further certify that this institution or organization meets the qualifications for a matching gift as outlined in the program description on the Matching Gifts Program Rules and Instructions form.	
In addition, I hereby certify that the donor will receive no benefits of any kind (e.g. tuition offsets, proprietary research, free or discounted tickets, etc.) as a result of The ERIE's matching gift.	
Signature of Authorized Financial Officer of Institution or Organization _____ Date _____	
Please Print Name and Title _____	



## ERIE INSURANCE GROUP MATCHING GIFTS PROGRAM PROGRAM RULES AND INSTRUCTIONS

### General Guidelines:

The Matching Gifts Program provides funds for matching donations to eligible organizations and educational institutions made by full-time and part-time Erie Insurance Group Employees and Directors of the Erie Indemnity Company Board dollar for dollar up to a total of **\$5,000** per Employee/Director per year. Funds are designated on a calendar-year basis. At the end of the calendar year, unused funds expire and do not carry over to the next year.

Employees who retire or terminate employment or Directors who retire or terminate from the Board will no longer be eligible to designate funds as of their retirement or termination date.

The minimum eligible donation is **\$25**.

To qualify for matching funds the Matching Gifts Form must be received by Erie Insurance Group within the same calendar year in which the donation was made. Matching Gifts Forms received within 30 days following the end of the calendar year will be credited to the per Employee/Director \$5,000 limit of the previous calendar year.

Erie Insurance Group reserves the right to modify, change or eliminate portions of the program or the entire program or the Program Rules and Instructions at any time with or without notice at management's discretion. Erie Insurance Group reserves the right to determine which organizations and institutions are eligible to receive donations via the Matching Gifts Program.

### Eligible 501(c)(3) Organizations or Educational Institutions:

- All public and private two or four year degree-granting colleges, universities, graduate, professional or technical schools located in the U.S. or one of its possessions and accredited by an accrediting agency that is recognized by the U.S. Office of Education.
- Donations to tax-exempt alumni funds, foundations, and associations whose exclusive purpose is the support of one of these educational institutions.
- All nonprofit organizations located in the U.S. 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 and not listed as "Ineligible" below.

### Eligible gifts include:

- Personal contributions that are made as direct donations (not merely pledged) by an Employee or Director in the form of cash or securities. (In the case of securities, the applicable market value is the last sale price or published bid price on or before the date the donation is received by the recipient.)

**Note:** If an Employee or Director wants ERIE's matching gift to be given to an alumni fund, association, specific chapter, department or educational foundation, he/she must specify this on the front of the Matching Gifts Form. In this case, the Authorized Financial Officer of the institution or organization must certify (via signature on the Matching Gifts Form) that the recipient fund, association, department or foundation is part of the institution or organization and will use all of the contributions to benefit the institution or organization.

### Ineligible gifts include, but are not limited to:

- Donations meant to subsidize athletic programs, athletic scholarships or athletic booster clubs;
- Donations that provide a direct benefit to the donor, the donor's family or any other specified individual, including:
  - Tuition payments, student fees, book fees or subscriptions;
  - Donations to scholarship funds where the scholarship recipient is designated by the donor;
  - Donations that in themselves or in combination with Erie Insurance Group's matching gift lead to the donor's receiving benefits of more than nominal value, such as receipt of athletic spectator tickets or the option to purchase such tickets;
  - Membership dues for alumni groups, social groups or athletic or other clubs;
  - Church-related pledges, tithes or financial commitments;
- Donations designed for:
  - Specific individual research projects;
  - College radio or television projects;

- Employee/Director donations that were made with funds provided in whole or in part to the donor by other individuals, groups or organizations;
- Donations to political, labor, or religious organizations. (Note that programs affiliated with faith-based organizations such as food banks or shelter services, for example, are eligible as long as the programming serves the whole community, regardless of religious affiliation);
- Donations made to federated campaigns such as the United Way, United Jewish Appeal, Fund for the Arts, Arts Alliance are not eligible for matching gifts. Contributions must be made directly to a qualifying 501(c)(3) nonprofit organization;
- Donations made by or through community Trusts or similar organizations, including Charitable Remainder Trusts, Donor Advised Funds, Private or Family Foundations, or Family Trusts;
- Cumulative donations or group donations from several individuals reported as one donation such as those collected from fund-raising efforts such as walk sponsorships, bake sales, benefit dances, silent auctions, bike-a-thons, raffles, etc. Only the donor's personal donation can be matched;
- Donations made by friends, family members, retirees, or Agents. If a friend or family member is a current Erie Insurance Group Employee, he or she may submit for a company match on their own;
- Donations made to any organization that does not align with Erie Insurance Group's commitment to diversity and inclusion. ERIE's commitment to diversity and inclusion is reflected in our corporate values to live by the Golden Rule: to treat others as we want to be treated. ERIE seeks to sustain this commitment through our mission to recognize, respect and value the diversity of all individuals, in all segments of the communities where we work, live and do business;
- Donations to Endowment Funds; and
- Donations made as bequests.

**Instructions for Employee or Director Matching Gifts Program Request:**

1. Complete the section of the Matching Gifts Form "To be Completed by Employee/Director."
2. Print and mail:
  - a. Matching Gifts Form
  - b. Program Rules & Instructions
  - c. Your donation to the Institution or Organization

Note: Your donation can be matched only if the Program Rules & Instructions are mailed to the institution or organization so verification of their 501(c)(3) or educational institution status can be provided to us.

**Instructions for Authorized Financial Officer of Institution or Organization:**

1. Complete the section of the Matching Gifts Form "To be Completed by Institution or Organization."
2. Mail completed form and verification of your 501(c)(3) or educational institution status to:

Erie Insurance Group  
 Matching Gifts Program  
 100 Erie Insurance Place  
 Erie, Pa 16530

When a Matching Gifts Form is received from the recipient institution or organization, eligibility will be verified and matching gift will be processed and sent to recipient institution or organization.