

Part A

To be completed by donor

Please complete this part and mail folder with your gift to the Institution receiving the gift.

Name

Street Address

City, State, Zip Code

Board Member **Employee** **Retiree**
(Check one)

Institution Receiving Gift

Gift Amount or Number of Shares Date of Gift

Title of Security

Market Price — At Date of Gift

I certify that the information is correct and represents my personal gift under the provisions of the Shelter Foundation Matching Gifts Program, and will not entitle me or my family to any personal benefit other than the recognition of the gift.

Signature

Part B

To be completed by the Institution and sent to the Shelter Insurance Foundation

To apply for matching gifts, this certification must be completed by an authorized official of the receiving institution. Return Parts A & B to:

**Secretary
Shelter Insurance Foundation
1817 West Broadway
Columbia, MO 65218-0001**

Payments will be made quarterly by the Shelter Insurance Foundation.

I certify that the institution named below meets the qualifications outlined in this folder and received the gift as follows:

\$ _____
Amount Date Received

Name of Institution

Business Address

City, State, Zip Code

Name and Title of Authorized Officer

Signature of Authorized Officer

**Shelter
Insurance
Foundation**



**MATCHING GIFTS
PROGRAM FOR
HIGHER EDUCATION**

PURPOSE OF THE PROGRAM

This program is established by the Shelter Foundation to match contributions to academic programs of eligible institutions of higher education. The objective of the program is to encourage employees and members of our Board of Directors to make contributions to institutions of higher learning. Under this program, the Shelter Foundation will match personal gifts of eligible contributors to qualified educational institutions on a one-to-one basis.

ELIGIBLE CONTRIBUTORS

All full-time, active employees after six months of employment, members of the Board of Directors of the Shelter Insurance Companies and retirees are eligible to participate in this program. You do not have to be a graduate or have attended the school in order to participate.

ELIGIBLE INSTITUTIONS

Any private or tax-supported college or university or graduate or professional school that grant degrees in two- or four-year programs is eligible. The institution must be accredited by one of the recognized regional accrediting commissions and must have tax exempt status under Section 501(c)(3) with the

Internal Revenue Service. Gifts may be made to the Foundation of any qualifying institution provided that it is tax exempt and is not a private foundation under the Internal Revenue Code.

QUALIFYING GIFTS

The Shelter Foundation will match each eligible contributor's gift of \$25 or more up to an aggregate of \$3,000 in the calendar year. Gifts must be actually made and not just pledged.

Gifts must be personal contributions by the eligible participant in the form of cash, check, credit card or publicly traded securities (valued on the day the gift is made) given directly to the eligible institution. Gifts may also be used to create or fund memorial funds.

Contributions may be made to more than one eligible institution. All contributions are subject to an aggregate limit of \$3,000 in a calendar year. Excess contributions cannot be carried over to succeeding years.

INELIGIBLE CONTRIBUTIONS

Contributions that are not eligible include payments for tuition, books, loans or student fees; dues to alumni groups; gifts to athletic teams, clubs, fraternities and sororities; pledges or pooled gifts; gifts for athletics including

athletic associations and scholarships; and gifts entitling the giver to some personal benefit to the donor or the donor's family other than the recognition for the gift.

HOW TO PARTICIPATE

In order to participate, an eligible person must make their contribution directly to the educational institution on a Matching Contributions Form, using a separate form for each gift.

The educational institution then will complete the verification section of the form and submit it to the Shelter Foundation for matching funds. The Foundation must receive the form from the eligible institution within one year of the date of the gift to be eligible

The Shelter Foundation will distribute matches four times each year after verifying the eligibility of the gift, institution and the contributor. The Foundation will notify the contributing person when the matching gift is made to the institution which is typically within three to four months from the receipt of the verifying form.

The Shelter Foundation is solely responsible for the administration of the program and for the resolution of all eligibility questions. The Foundation may modify or discontinue the program at any time.