

## **Travelers Community Connections Matching Gifts Program Guidelines**

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The Travelers Community Connections Matching Gifts Program is funded by Travelers and administered by a third-party resource. There are two parts to the Matching Gift program:

- **Matching Gifts** -- The program matches up to \$500 U.S. dollars of employee charitable contributions per year. The minimum grant matched to each eligible organization (see requirements for eligible organizations below) is \$50 U.S. dollars.
- **Volunteer Match** -- When an employee volunteers 24 hours in a calendar year to an eligible organization, the employee may apply for a \$500 U.S. dollar grant to that same organization. Employees may request one gift per year. The gift cannot be divided among various groups; the gift must go to one organization only.

### **Matching Gifts**

You must contribute at least \$50 U.S. dollars to an eligible organization in order for your gift to be matched. The maximum amount that can be matched per employee in a year is \$500 U.S. dollars. You may divide your contributions among more than one organization as long as each receives at least \$50 U.S. dollars, and the total of all of your gift requests do not exceed \$500 U.S. dollars per calendar year. The contribution must be made directly by you and not from a donor fund or a combined collection of contributions by friends, family or other employees.

*Eligible gift to be matched:* The money you contribute, and the matching funds, must go toward the eligible organization's direct benefit. That means your money must be given for the organization's operating budget, programs, materials, equipment, or expenses for special projects. The matching funds cannot be used to pay an employee's personal pledge and it cannot provide a direct benefit to any company employee. Your gift may be in cash (receipt may be required), check or credit card, or in marketable securities. Applications must be received by December 31 of the year in which the gift was made. If you donate securities, the matching gift amount will be the average price on the date of the employee's gift.

### **Volunteer Match**

Employees may apply for a \$500 U.S. dollar grant to one eligible nonprofit organization if they have provided at least 24 hours as a direct service volunteer or as a volunteer board member at the organization during a calendar year. Employees do not need to contribute a monetary gift to be eligible. The award can go to one organization only, and must fit the program guidelines. The volunteer application must be completed on or before December 31 of the year in which the volunteer service was given. Hours may not be bundled from more than one organization to make up the 24 hours of service. Hours cannot be combined among more than one employee to make up the 24 hours of service.

### **General Guidelines for Both Programs**

*Eligible Employees:* All active and short-term disability U.S. employees, either full- or part-time employees may participate.

#### *Nonprofit Eligibility:*

- Must be a U.S. nonprofit, 501(c)(3) or a U.S. federal, state or local government agency as provided by Section 170(c)(7) of the IRS code.
- Must attest that it does not discriminate against any person or group on the basis of race, gender, religion, culture, age, physical disability, sexual orientation, gender identity, status as a military veteran, genetic information or political affiliation.
- Must attest that the organization is in full compliance with federal anti-terrorism laws.

- Examples of eligible organizations:
  - Education: Public or private elementary, secondary, or technical/vocational schools, colleges, universities and PTAs;
  - Human Services: Community clinics, health agencies, relief agencies, emergency shelters, support groups, and agencies for children and youth;
  - Civic: Neighborhood associations, crime prevention and housing agencies, humane societies, and economic development organizations;
  - Arts/Cultural: Theaters, public television and radio, performing arts organizations, libraries, and museums;
  - Environmental: Conservation and wildlife protection organizations;
  - Health: Hospitals, blood banks, and disease-specific organizations.
  
- Contributions that would be ineligible:
  - In-kind gifts; life income trusts; real estate; bequests; dues; subscription, membership, registration or sponsorship fees; tuition; student fees; insurance premium payments; or gifts that are not made as a direct contribution to eligible nonprofit organizations;
  - Gifts made to pay admission to benefits or fund-raising events or to acquire other tangible benefits (tax deductible portion is matched if it is \$50 U.S. dollars or more);
  - Gifts to religious or sectarian organizations (for example: churches, seminaries, synagogues); unless the funds have been directed to a specific program that is nondenominational in nature, does not espouse a specific faith (Buddhist, Christian, Hindu, etc.), and benefits the broader community outside of the organization as a whole (e.g., soup kitchen, homeless shelter, etc.). If the contribution is not designated, it will be automatically declined. PLEASE NOTE: Both your donation and the corresponding matching grant must be used for a non-religious program benefitting the broader community (e.g., soup kitchen, homeless shelter). Funds cannot be used for the purpose of proselytizing.
  - Gifts to educational institutions that limit enrollment to a particular faith;
  - Gifts to organizations that are ineligible to receive corporate contributions because of state or federal law, such as political groups;
  - Gifts to fraternal organizations;
  - Pooled gifts made by groups. Employees must make individual qualifying gifts and submit individual requests;
  - Gifts made by spouses/partners individually, or gifts made on behalf of deceased employees;
  - Gifts made by retired Travelers employees;
  - Gifts made by employee-parents for the benefit of their own children (for example: individual scouting groups and individual youth athletic teams). Gifts must benefit the organization and not just the child;
  - Gifts to organizations that have discriminatory practices not in keeping with corporate diversity strategies or that discriminate against any person or group on the basis of age, political affiliation, race, national origin, disability, sexual orientation, gender identity, veterans, genetic information, or religious belief;
  - Donations to organizations representing a conflict of interest for the applicant;
  - Gifts to activities that represent a conflict of interest for Travelers; or
  - Pledges and third-party donations. This includes donations made on your behalf in lieu of receiving a prize or other tangible gift for participation in an event, drawing, contest, etc.

**IMPORTANT: Travelers reserves the right to revoke, suspend or terminate the Travelers Community Connections Matching Gifts program at any time and has no obligation to match donations made after that time. The Company has no obligation to match donations if total funds provided for the program have been exceeded and reserves the right to prorate any matching gifts according to available funds.**