

Administration of Matching Gifts

1. Each eligible donor will participate in Penn Mutual's Matching Gifts Program by submitting this application to an eligible recipient institution with an eligible gift of at least \$50 in value. The gift will be eligible to be matched when Penn Mutual receives the completed application provided the application is received within one year of the Donor's gift date. Penn Mutual's matching gifts will be an amount equal to the donor's gifts, except that:
 - a. the total matching gifts per donor per year will not exceed \$1,000, and
 - b. the total number of matching gifts per donor per year will not exceed three.
2. Penn Mutual will match only gifts of cash and/or securities having a quoted market value. The donor should determine the value of securities contributed by referring to the last published sale or bid price on the date of the gift.
3. Gifts from the donor may be restricted but the Penn Mutual matching gifts will be unrestricted.
4. Applications may be submitted from January 1 through December 31 however, if Penn Mutual receives a completed application after December 15, it may not process the application until the following year. In that case, the matching gift will be applied to the following year's maximum limit, with no "carry over" provision.
5. All decisions regarding the eligibility of donors, recipient institutions and gifts sought to be matched will be the sole responsibility of Penn Mutual and such decisions will be final.

Eligibility – Recipient Educational Institutions

- Degree-granting graduate and professional schools, universities, four-and-two-year colleges and technical institutes will be considered if they are fully accredited by a regional or professional accrediting agency recognized by the Council on Postsecondary Accreditation (COPA).
- The American College, Bryn Mawr, PA.
- The United Negro College Fund.

Eligibility – Donors

- All full-time active Penn Mutual corporate associates who have completed thirty-six full months of continuous service.
- All full-time active employees of Hornor, Townsend & Kent, Inc. who have completed thirty-six full months of continuous service.
- All full-time active Penn Mutual field managers and field office staff who have completed thirty-six months of continuous service.
- All full-time active Penn Mutual producers who have qualified for the prior year's Leaders' Circle.
- All full-time active Penn Mutual producers as follows:
 - STAR Program Members
 - Golden Eagle and Royal Blue conference qualifiers
 - Masters' program qualifiers with requirement of three years of Penn Mutual production.

Attendance at a recipient institution by the donor is not a requirement.



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Matching Gifts



for Higher
Education





Matching Gifts Program

The Penn Mutual Life Insurance Company

Donna Beath, Contributions Coordinator • 600 Dresher Road - C3A • Horsham, PA 19044 • 215-956-8060

APPLICATION PROCEDURE (Please print in ink or type)

DONOR

Complete Section I and forward the entire form, along with your gift, to the recipient institution.

RECIPIENT INSTITUTION

Complete Section II and return the entire form to the address on top. Please provide your organization's W-9 form with this form.

The Penn Mutual Life Insurance Company

Penn Mutual will match the donor's gift. Penn Mutual will also send the donor an acknowledgement of this action. Gifts may be made from January 1 through December 31. The first processing of matches will be processed June 15th; the second by December 15th. Applications received after December 15 will be processed in the following calendar year and counted towards that new calendar year with no carry over privilege.

SECTION I – DONOR

Name _____

Home address _____

City _____ State _____ Zip _____

Date of gift _____

- ☐ Corporate associate (PML & HTK)
☐ Trustee
☐ Field Management
☐ Field Office Associate
☐ STAR Program Member
☐ Producer (Golden Eagle conference qualifier)
☐ Producer (Royal Blue conference qualifier)
☐ Masters' Program Member (see *Eligibility on reverse*)

Name of recipient institution _____

Address of recipient institution _____

City _____ State _____ Zip _____

Date of gift _____

MY GIFT:

☐ Cash – Amount \$ _____

☐ Securities – Describe _____

Securities valued at \$ _____

Name of issuing company or entity _____

I certify that I am an eligible donor and that the gift described above is within the guidelines of Penn Mutual's Matching Gifts Program.

I authorize the recipient institution to apply to Penn Mutual for a matching gift.

Signature _____ Date _____

SECTION II – RECIPIENT INSTITUTION

The signature of the officer authorized to complete this application certifies that, in accordance with the standards set forth on the reverse of this application, (a) the gift received from the donor is eligible for matching and (b) the recipient institution qualifies as an eligible recipient. The undersigned institution hereby applies to Penn Mutual for a matching gift. (Enclosed is a bona fide copy of our institution's 501(c)(3) tax-exempt letter from the Internal Revenue Service.)

(Note: Forms after December 15 will be matched in the following calendar year. In order to speed the process, forms may be faxed, but the original form should be mailed to Penn Mutual.) Please fax to: Donna Beath at 215-956-8347.

Name of institution _____

Complete address _____

City _____ State _____ Zip _____

Signature _____

Accredited by _____

Name of official _____

Title and phone # of official _____

Organization's Employer Identification Number (EIN) _____

Date _____