

## **RLI Employee Matching Gifts Request Form**

Instructions: Individual employee completes **Part A** and mails form with contribution.

The qualifying organization completes **Part B** and mails information to:

**RLI Employee Matching Gift Program**

**Attn: Curt Wardelman**

**9025 N. Lindbergh Drive**

**Peoria, IL 61615-1431**

### **Part A - To be completed by Eligible Employee or Participant:**

To: \_\_\_\_\_  
Name of Organization

Address \_\_\_\_\_ City, State, Zip \_\_\_\_\_

Enclosed is my gift in the amount (\$50 minimum) of \$ \_\_\_\_\_. I would like to have \$ \_\_\_\_\_ of my gift matched by the company. To obtain a matching gift, I authorize you to report my gift to the RLI Employee Matching Gift Program. My signature validates that my contribution does not violate the documented guidelines of RLI Employee Matching Gift Program and I did not receive any services or merchandise in exchange for the above contribution.

\_\_\_\_\_  
Individual's Signature

\_\_\_\_\_  
Individual's Name (Print or Type)

\_\_\_\_\_  
Home Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Phone

When your contribution is matched, an email confirmation will be sent acknowledging your participation in the program and the balance remaining available to you. Gifts will be matched until the fund is depleted.

### **Part B - To be completed by Eligible Charitable Organization:**

I certify that the gift described above has been received and that this institution/organization is a nonprofit organization, contributions to which are deductible under Section 501 (c) (3) of the Internal Revenue Code. Furthermore, I certify that this gift is a voluntary charitable contribution and does not represent in any way a fee for merchandise or service.

\_\_\_\_\_  
Signature of Officer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

\_\_\_\_\_  
Please type or print name of officer

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
E-mail address

\_\_\_\_\_  
Name of charitable organization \*

\_\_\_\_\_  
Organization's employer identification number (EIN)

\_\_\_\_\_  
Address, City, State and Zip

\_\_\_\_\_  
Organization's web site address

Intended use of the contribution, which must meet documented RLI Employee Matching Gift Program Guidelines

**\* To qualify for a matching gift consideration the following four things must be provided with this form. A copy of the employee's check (1) or accounting proof validating the contribution, the IRS tax exempt (2) ruling letter (4168C) with employer identification number and information (3) documenting the mission statement of the charitable organization for qualification purposes. This form and related information (4) must be postmarked or received within 45 days of the employee contribution to be eligible for the RLI Matching Gifts Program.**

**- Please return to the RLI Employee Matching Gift Program address listed above. -**

## **RLI Employee Matching Gifts Program**

RLI employees', officers' and directors' monetary contributions to an eligible charitable or scholastic organization of their choice will be matched by RLI, subject to the published RLI Employee Matching Gift Program Guidelines.

### **Requirements for Matching Gifts:**

1. Employee contributions must be a minimum of \$50.
2. Total contributions are subject to an annual maximum of \$3,000 per employee.
3. The company establishes an annual calendar year amount, which once exhausted will cease company matching contributions for that year.
4. Contributions are limited to the following types of organizations:
  - a. Charitable or cultural organizations which qualify as nonprofit by the IRS for the purpose of promoting human health, education or well-being.
  - b. Educational institutions, such as accredited universities, accredited colleges, accredited junior colleges, and public or private elementary and secondary schools accredited by a nationally recognized agency or a state department of education.

Matching Gifts contributions will NOT be made to political, fraternal, faith based or religious organizations, unless specified for a non-religious community support program, such as a soup kitchen or homeless shelter or other ineligible organizations as determined by the company. Contributions that involve any type of return to the individual, such as meals, subscription fees, tickets for benefits, fees for services, tuition payments, and real or personal property are considered in violation of the program and will not be matched. Additional requirements and information associated with the program can be found on RLInet within the Community Alive section in RLI Employee Matching Gift Program Guidelines.

### **Operation of the program:**

1. When an eligible contribution is made to a qualifying organization meeting the guidelines of the RLI Employee Matching Gift Program an employee completes Part A of the Matching Gifts Request Form. (Program guidelines and form are located in the Community Alive section of RLInet).
2. The Matching Gifts Request Form with the employee's qualifying donation is sent to the eligible charitable organization. An officer of the organization completes Part B of the form and returns it with the necessary documentation to the designated RLI contact. The form must be postmarked or received within 45 days of the employee contribution to qualify for the program.
3. The RLI Employee Matching Gift Program will disburse matching funds at the end of each quarter for the previous quarter to eligible charitable organizations as determined and qualified by RLI.

Questions about the administration of the program or eligible organizations should be directed to Greg Tiemeier or 309-692-1000 ext. 5692 or [greg.tiemeier@rlicorp.com](mailto:greg.tiemeier@rlicorp.com).