



Matching Gifts Request Form

To be eligible under this program, the completed form and associated documentation must be received by Verisk on or before December 31

Part A – Donor Section

- Person making donation fills out Part A, then
- Sends this form to the Recipient Organization (i.e. the charity or organization that you make your donation to)
- Recipient Organization will complete Part B and return this form to Verisk

NOTE: Minimum donation must be \$50 or more.

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| DONOR INFORMATION – PART A |
| Active Employees Employee ID: <i>*If donor is the spouse/domestic partner of an active employee please enter employee ID above.</i> |
| <u>Donor Status</u> <input checked="" type="checkbox"/> Employee <input type="checkbox"/> Employee Spouse/Domestic Partner <input type="checkbox"/> Retiree <input type="checkbox"/> Retiree Spouse/Domestic Partner <input type="checkbox"/> Director <input type="checkbox"/> Director Spouse/Domestic Partner |
| Donor Name: |
| Home Address: |
| City/State/Zip: |
| Phone/Email address: |
| Recipient Organization Name: |
| EIN Number: |
| Street Address: |
| City/State/Zip: |
| Program Designation (if any): |
| Date of Gift: |
| Amount of Gift: |
| Type of Gift: |
| If Securities Name of Security: |
| Date of Transfer: |

Certification Statement: I hereby certify that the information I have provided is complete and correct and that my gift hereby complies with the program provisions stated on this form.

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| Donor Signature: |
| Date: |

Part B – Recipient Organization

- Please complete Part B of this form
- You **MUST** attach a copy of your organization's IRS Federal 501 (c) 3 determination letter **or the donation will not be matched by Verisk**
- Submit the form and determination letter by email, as instructed below. (Please do not fax). All forms and associated documentation **MUST** be received by Verisk on or before December 31

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| RECIPIENT INFORMATION – PART B |
| Gift Amount |
| Tax Deductible Gift Amount |

Certification Statement: I hereby certify that this organization has received the gift described herein and that such gift will be used to support our primary mission. I further certify that this gift has not been provided in lieu of tuition or fees, and that the "Tax Deductible Gift Amount" is net of any goods or services provided to the donor.

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| Name of Organization Representative |
| Title |
| Signature |
| Date |
| Phone |
| E-mail Address |

Send completed form, with a copy of your IRS Federal 501(c) 3 Determination letter to:

Matchinggifts@verisk.com

MATCHING GIFTS WILL BE DISBURSED DURING THE FIRST QUARTER OF THE FOLLOWING CALENDAR YEAR



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Matching Gifts Program Guidelines

Purpose

The purpose of the Verisk Matching Gifts Program is to encourage support of certain nonprofit educational or charitable organizations by magnifying personal gifts by employees, directors and retirees.

Who is eligible to participate?

Full-time and part-time active Verisk employees, directors and retirees, and their spouses and domestic partners are eligible to participate in the matching gifts program.

Eligible Institutions

Eligible organizations must be located in the United States or one of its possessions and be recognized as tax-exempt, nonprofit educational or charitable organizations as defined under Section 501(c)(3) of the U.S. Internal Revenue Code. To be eligible, an educational organization must be a secondary school; a degree-granting two- or four-year private or public college or university; a graduate school; or a law, medical or dental school accredited by a recognized accrediting association.

What is an eligible gift?

Gifts must be actual contributions (not pledges), paid by check, cash, credit card or publicly traded securities (valued at the closing price on the day the gift is made) from personal funds.

The minimum gift under the program is \$50. The annual limit (which may be comprised of one or more gifts) for active employees and directors is \$5,000*; for retirees, \$2,500*.

*These limits apply to total gifts made by a spouse/domestic partner AND employee, director or retiree.

What gifts are ineligible?

The following gifts are not eligible for matching under the program:

- Gifts which afford the contributor a personal benefit in return for the donation.
- In-kind gifts, life income trusts, or real estate.
- Indirect contributions to eligible nonprofit organizations (tuition, student fees and loans, dues, insurance premium payments, etc.)
- Gifts for religious organizations, unless the specific program is nondenominational in nature and benefits a broad range of the community (e.g., soup kitchen, homeless shelter).

How much of an eligible participant's gift is matched?

Eligible gifts will be matched up to 100% if the annual program budget allows. If overall participant demand exceeds the budget, prorated adjustments in the matching amounts awarded to eligible organizations will be made.

When are matching gifts paid?

Eligible matching gift requests that are received and confirmed by December 31 of each year will be disbursed during first quarter of the following calendar year.

Questions about the Verisk Matching Gifts Program

Verisk reserves the right to modify or discontinue this program at any time. The interpretation, application and administration of the provisions of this program shall be determined solely by Verisk and its decisions shall be final. Questions may be directed to:

matchinggifts@verisk.com

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