

# NATIONWIDE MATCHING EDUCATIONAL GIFT PROGRAM

## Institutions Eligible

- Private and tax-supported four-year colleges or universities, graduate or professional schools, seminaries and theological schools, junior or community colleges offering at least a two year program of college-level studies, that are:
  - Recognized as tax-exempt under Section 501(c)(3) of the Internal Revenue Service code;
  - Located in the United States or its possessions;
  - Listed in the Higher Educational Directory, or are identified with appropriate regional or professional accreditation
- Alumni funds, foundations, and associations that are an integral part of an eligible institution, if:
  - They are recognized by the I.R.S. as tax-exempt as described above;
  - The grant will be transmitted to the eligible institution for its use.

## Institutions Not Eligible

- State or regional associations of private colleges and national educational associations
- Private and/or tax-supported elementary and secondary schools.

## Donors Eligible

- All active employees and members of the Boards of Directors of companies within Nationwide
- Retired Nationwide employees
- Retired members of the Boards of Directors
- Licensed, exclusive insurance sales agents, including independent contractor, career, and salaried agents of companies within Nationwide
- Retired exclusive insurance sales agents, including independent contractor, career, and salaried agents of companies within Nationwide

## Donors Not Eligible

- Spouses and surviving spouses
- Other family members
- Retirees of Nationwide subsidiary companies who retired prior to acquisition by Nationwide
- Independent sales agents or brokers
- Associate agents or agency staff not employed by Nationwide

## Gifts Eligible

- The tax-deductible portion of contributions made by eligible donors to eligible institutions will be matched dollar for dollar by the Foundation
- Minimum gift to be matched is \$25
- Maximum annual gift to be matched is \$5,000 per person per calendar year
- Gifts of at least \$25 each may be made to one or more eligible institutions as long as they do not exceed a total of \$5,000 per donor per calendar year
- Gifts must be made (not pledged) in cash, by check, or in securities having a value to be determined in the sole judgment of the Foundation as of the date given
- Gifts from eligible donors may be designated for a specific use, but the Foundation's matching gifts will be unrestricted for educational purposes

- A matching gift form must be completed and sent to the eligible institution with the contribution. To qualify for the match, the eligible institution must submit the matching form to the Nationwide Foundation within one year of the contribution
- Gifts will be credited to the donor in the calendar year in which the contribution was made
- Eligible contributions will only be matched once by the Nationwide Foundation, even if the contribution qualifies for a match under multiple programs offered by the Foundation

## Gifts Not Eligible

- Bequests
- Memberships, subscriptions, dues, fees, tuition, or any form of purchase or payment for services
- Contributions that reduce tuition
- Contributions to national or local alumni groups
- Any amount paid for the right to purchase tickets, obtain a seat license or other special seating, or parking passes for events
- Insurance premium payments
- Unpaid, pledged contributions
- Contributions made from other than the contributor's personal assets or personal account, including contributions made from an organization or entity such as a business, foundation, trust or donor advised fund
- Gifts to private or publicly-funded elementary or secondary schools

## Administration

- Foundation matching gifts are distributed continuously
- Upon verification of eligibility, a Foundation matching grant will be forwarded to the institution. The eligible donor whose gift is being matched will be notified at that time
- The Nationwide Foundation reserves the right to discontinue or change this program at any time without any notice either to eligible persons or qualified institutions Interpretation, application, and administration of the provisions of the program shall be made by the Nationwide Foundation, and its decision shall be final
- Donor cannot designate Foundation's matching gift for any specific purpose including fulfillment or cancellation of any personal obligation
- Application forms may be obtained by calling (614) 249-0039. Forms may also be obtained from the Nationwide Intranet.

To ensure that your eligible gift is matched by the end of current calendar year, completed forms must be received by the Nationwide Foundation no later than November 30. Forms received after November 30 will be processed the following year.

