

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.

(To be completed by donor - Please type or print) Date of Gift _____

Check One: Agent Board Member Employee Retiree

Name _____

Home Address _____
(Street)

(City) _____ (State) _____ (Zip) _____
Work Phone Number _____

Agent or Employee Number _____ Company Name _____

College or University Receiving Gift _____

Your Gift \$ _____ or _____ shares of _____

I authorize the institution to report the contribution described above to the Nationwide Foundation's Matching Educational Gift program and I affirm that the contribution being reported is my own personal contribution. I understand the Nationwide Foundation's matching gift will be made payable to the institution's general fund and is to be unrestricted for educational purposes. In addition, I understand that this matching gift cannot be designated for any specific purpose by me, including the cancellation of any personal obligation. I further acknowledge that the Foundation assumes no responsibility for the allocation of the matching gift.

I certify that my contribution

- Meets all the qualifications of the program
- Qualifies as my tax-deductible contribution
- Comes completely from my personal assets and is not in part or in whole the gift of another individual, organization or entity made through me. Organizations and entities include, but are not limited to a business, foundation, trust or donor advised fund.

Donor's Signature _____

Part A

Instructions to donor

Complete Part A and mail this form, with your gift, to the college or university.

Forms must be properly filled out before your contribution can be matched,

(To be completed by the financial officer of the college or university)

Date institution received gift _____

Amount \$ _____, of which \$ _____ is tax deductible.

Full Name of Institution _____

Business Address _____
(Street)

(City) _____ (State) _____ (Zip) _____
Name _____ Email _____ Phone _____

I certify that the institution or associated organization named meets the requirements outlined in "Institutions Eligible" on the reverse side of this form and that this contribution:

- Meets all requirements as described by this form
- Has been made and not merely pledged
- Is in the amount and form listed above
- Does not represent tuition in any way
- Does not provide the contributor or the contributor's family more than an incidental benefit and is truly charitable
- Appears to be made from the contributor's personal assets or personal account and does not appear to be made from any organization or entity. Organizations and entities include, but are not limited to, a business, foundation, trust, or donor advised fund.

I further certify that:

- The Nationwide Foundation received no goods, services or other quid pro quo as defined in the relevant IRS rules and regulations
- The matching contribution from the Nationwide Foundation will be unrestricted for educational purposes
- Funds from the Nationwide Foundation will not be used for political, religious, or athletic purposes other than scholarships

Contact Signature _____

Part B

Instructions to the college or university

Complete Part B and return the entire form to:

Nationwide Foundation
One Nationwide Plaza
1-2-16
Columbus, OH
43215-2220