

# Securian Financial Matching Gift Program

## Together we are better

By serving our community responsibly through philanthropy, associates help carry on the Company's long-standing reputation of being a good neighbor. Through the Matching Gift Program, the Securian Financial Foundation matches contributions to most nonprofit organizations.

## Who can request a matching gift

The program is sponsored and administered by Securian Financial Group, Inc., for eligible associates and the associates for our subsidiaries/affiliates at Securian Asset Management and Securian Financial Services, under the same terms and conditions as Securian Financial Group, Inc., associates. You can request a matching gift if you are a Securian:

- Benefits-eligible associate,
- Benefits-eligible retiree or
- Member of the Board of Directors.

## Organization eligibility

You can request matching gifts for most nonprofit organizations. Ineligible organizations include churches, faith communities and political organizations.

The Securian Financial Foundation supports organizations, projects and programs that do not discriminate on the basis of race, color, religion, national origin, sex, gender identity, sexual orientation, age disability or any other legally protected characteristics. The foundation does not knowingly award grants to organizations that discriminate in their hiring, those they accept as volunteers or the clients they serve.

Eligible organizations must be recognized by the Internal Revenue Service as tax exempt and to which contributions are deductible for income tax purposes.

## Gift eligibility

The Foundation will match your contributions of \$25 or more up to a total of \$2,000 per calendar year. You can request matching gifts for more than one organization if each of your contributions is at least \$25 and the total of all contributions does not exceed \$2,000.

Each gift must be a charitable contribution with no services, benefits or items of value accruing to you or anyone designated by you in return for the contribution or the matching contribution. For example, if you donate \$150 to a cultural organization and \$50 of the gift is considered membership dues with accompanying membership benefits, the dollar amount matched by the Foundation would be \$100.

Your gifts must be paid, not merely pledged. You can pay by cash, check, credit card, payroll giving, stock or marketable securities. Gifts of stock are valued according to the stock exchange listing as of the donation date.

Ineligible gifts include gifts to churches, faith communities or political organizations; gifts less than \$25; gifts made in lieu of fees or ticket sales; dues paid to alumni associations, rather than to educational institutions; gifts for which reimbursement of any kind is made by another individual or organization; gifts to individuals; gifts as a substitute for tuition payments; and gifts made prior to an associate's hire date.

The Foundation reserves the right to suspend, change, revoke or terminate the Matching Gift Program at any time; it has no obligation to match donations made after that time. Matching gifts will be paid until the budgeted amount has been reached for the calendar year.

## Matching Gift Program application process

- After making your charitable contribution, complete this application and email or mail it to:

[humanresources@securian.com](mailto:humanresources@securian.com)

**Securian Financial Foundation, Matching Gift Program, 19-3507**

**Securian Financial**

**400 Robert Street North**

**St. Paul, MN 55101-2098**

- When we receive your application, the Securian Financial Foundation notifies the nonprofit and asks it to verify your gift electronically.
- The Securian Financial Foundation approves the match request and disburses the match to the nonprofit organization. Matching gift requests are approved and funds disbursed on a monthly basis.
- Please add your email address below to be notified of your match request approval.
- Applications must be received by the Foundation by January 31 of the year following your gift. Applications received after that date will not be matched.
- Nonprofit organizations must verify the gift by March 31 of the year following your gift. Gifts not verified by this date will not be matched.

Contact the Securian Financial Foundation at [humanresources@securian.com](mailto:humanresources@securian.com) or, 651-665-3507, for further information regarding the program or the application process.

## Securian Financial's Matching Gift Program application

### Associate/retiree/board member

Name: \_\_\_\_\_ Email address: \_\_\_\_\_

Home address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ Telephone number: ( ) \_\_\_\_\_

Retiree       Board Member       Securian associate

### Gift information

Date of gift: \_\_\_\_\_ Amount of gift/market value: \$ \_\_\_\_\_

Payment method: \_\_\_\_\_

Match amount requested (if different than amount of gift): \_\_\_\_\_

### Nonprofit organization information

Name of organization: \_\_\_\_\_

(Please complete the following information if known.)

Address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ Tax ID number: \_\_\_\_\_

I certify that my gift fully complies with program provisions and that my gift will be used for the direct benefit of the organization with no services, benefits or items of value (other than a tax deduction) accruing to me.

\_\_\_\_\_  
(Applicant name)

\_\_\_\_\_  
(Date)



INSURANCE  
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[securian.com](http://securian.com)

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