

Mosaic Retirement Planning

Matching Gifts Program Guidelines



To encourage and support the generosity and community involvement of clients, families, and households of Mosaic Retirement Planning we offer the Mosaic Retirement Planning Matching Gifts Program, which provides matching funds to the charitable organizations important to us. To maximize the impact of charitable giving, Mosaic Retirement Planning matches, dollar for dollar, donations made by eligible households, up to \$500 per year, to eligible nonprofit organizations.

WHO CAN PARTICIPATE?

Active, family households with at least 6 months of history with Mosaic Retirement Planning

WHICH INSTITUTIONS QUALIFY TO RECEIVE MATCHING FUNDS?

Organizations listed on the approved charity list published by Mosaic Retirement Planning and reviewed annually for inclusion.

ELIGIBLE ORGANIZATIONS

Are currently organized into 6 categories

1. Human Services
2. Miscellaneous
3. Women's Shelters & Family Services
4. Cancer Support
5. Homeless Shelters
6. Children with Special Needs

WHAT CONTRIBUTIONS ARE ELIGIBLE?

Must be a personal gift, from the donor's personal funds, which has been paid and not simply pledged. The minimum tax-deductible gift eligible for matching is \$25. For gifts in the form of installments, each installment must be submitted on a separate form and meet the \$25 minimum gift requirement.

- The maximum amount matched per donor per calendar year is \$500 on a dollar for dollar basis. If the donor makes several contributions, gifts will be matched in the order received, up to the maximum limit for the calendar year. Unused matching contributions do not carry over into the next year.
- Gifts must be personal contributions made directly to approved institutions.
- The donor's limit is based on the date of the gift.
- Gifts must be in the form of check, or credit card. No other form of personal or real property will be matched.

WHAT IS NOT ELIGIBLE FOR MATCHING?

- Gifts made by Community Trusts or similar organizations, including Charitable Remainder Trusts, Donor Advised Funds, or Family Foundations.
- Gifts made in lieu of tuition payment for services
- Fees for service or tuition payments
- Membership fees for which benefits are received
- Dues to alumni(ae) or similar groups
- Gifts or payments for primarily political or religious purposes
- Subscription fees for publications
- Insurance premiums
- Bequests or life income trust arrangements
- Gifts of real or personal property
- Cumulative gifts from several individuals reported as one contribution

HOW THE PROGRAM WORKS

The donor should:

- Complete Part 1 of the form.
- Mail the original form, with the donation and any other necessary documentation, to the institution of your choice. (Faxed copies will not be accepted.) The matching amount provided by Mosaic Retirement Planning will be for unrestricted support.

The recipient organization should:

- Complete Part 2 of the original application form.
- The authorized officer of the charity must verify the donation, sign the application and return the original form to the Mosaic Retirement Planning, 7200 S Alton Way, Ste B290, Centennial, CO 80112

Eligible gifts are processed and matched to institutions on the following quarterly schedule.

Received By:	3/1	6/1	9/1	12/1
Processed By:	3/31	6/30	9/30	12/31

IS THERE A TIME LIMIT FOR MATCHING MY GIFT?

Gifts must be registered within one year of the date of payment by check or credit card. Gifts registered after that time will not be eligible. All gifts must be verified by the recipient institutions in order to be matched by Mosaic Retirement Planning.

For more information, please contact Mosaic Retirement Planning via phone at 720-617-4400.

ADMINISTRATIVE CONDITIONS

Mosaic Retirement Planning (MRP) reserves the right to suspend, change, revoke, or terminate the Matching Gifts Program at any time. Additionally, MRP shall be the sole judge as to the eligibility of institutions, and gifts. The interpretations applicable and the administration of this program shall be determined by MRP and its decision shall be final.



Mosaic Retirement Planning

Matching Gifts Program Request Form

INSTRUCTIONS

Donor:

- ◆ Complete Part 1 of this form – one for each gift. *Please print or type.*
- ◆ Send the form and a copy of the program guidelines with your contribution to the recipient organization.

Recipient Organization:

- ◆ Verify receipt of gift.
- ◆ Complete Part 2 of this form. *Please print or type.*
- ◆ Forward form to the address printed below.

PART 1 - DONOR SECTION

NAME

HOME ADDRESS

CITY/STATE/ZIP

TELEPHONE, INCLUDING AREA CODE

E-MAIL ADDRESS

EXACT DATE OF GIFT

\$ _____ \$ _____

AMOUNT OF GIFT (MIN \$25) AMOUNT TO BE MATCHED (MIN \$25)

Type of gift: Please check one:

Check Credit

NAME OF ORGANIZATION

ORGANIZATION CITY, STATE

RESTRICTION OR PURPOSE (IF ANY)

I certify that neither my family nor I will derive any direct or indirect financial or material benefit from this contribution. I authorize the above-named recipient organization to report this gift to for the purpose of applying for a matching gift. I certify that my gift is a voluntary contribution, that it fully complies with the provisions of the program described herein, and does not represent in anyway a fee for a service or benefit. I have read and understood the guidelines of the Matching Gifts Program.

DONOR SIGNATURE _____ DATE _____

PART 2 - RECIPIENT ORGANIZATION SECTION

ORGANIZATION NAME

ADDRESS

CITY/STATE/ZIP

TELEPHONE, INCLUDING AREA CODE FAX, INCLUDING AREA CODE

E-MAIL WEBSITE ADDRESSES (IF ANY)

DATE GIFT RECEIVED

\$ _____ \$ _____

AMOUNT OF GIFT TAX DEDUCTIBLE GIFT AMOUNT

I hereby certify that the donor will not derive any personal material benefit from this gift or match.

AUTHORIZED OFFICER'S NAME (PLEASE PRINT)

TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZED OFFICER _____ DATE _____

MAIL COMPLETED FORM AND ANY REQUIRED ENCLOSURES TO:

Mosaic Retirement Planning Matching Gifts Program
7200 S Alton Way, Ste B290
Centennial, CO 80112

Phone: 720-617-4400

E-mail: Service@MosaicRetirement.com