

Using Matching Gifts

The Northwestern Mutual Matching Gifts program can be leveraged to support local nonprofit event sponsorships and table purchases. The organization(s) benefitting must be eligible for the program.

A 100% match (up to your remaining calendar year limit) for charitable donations are available for:

- US accredited schools, including K-12 public, private, nonprofit institutions of learning.
- Alex's Lemonade Stand Foundation.
- Childhood cancer nonprofits.
- Nonprofit organizations whose primary purpose is to support Veterans.
- **All nonprofits must be US based, and mission focused on US clients with a minimum annual operating budget of \$100,000.**

What's in?

- Fundraising breakfasts, luncheons, dinners and galas.
- Golf outings.
- Title or presenting sponsorship for community walks/runs/rides.
- Charitable concerts and sporting events.
- Fashion or art shows.
- Show house tours.

What's out?

Dollars to support any event that are not given personally by the donor (pledges for walks/runs/rides, lemonade stand or bake sale proceeds, collections for jeans days, tickets for events in which the price paid is equal to or less than the value). If the money is not donated directly from the financial representative, it is not eligible for match.

Rules that apply

- Organization must meet eligibility criteria above.
- Sponsorship cannot be paid via business (120) accounts. Payment must be paid via personal check or personal credit card.
- Matching gift requests must be processed online through the vendor cybergrants.nm.com, using single sign on.
- Only the tax-deductible portion of the sponsorship is eligible for match. The non-tax-deductible value (otherwise called the good/services or value of the ticket or seats) must be deducted from the overall sponsorship prior to calculating charitable gift and match.
- FR's portion of tax-deductible portion of the event sponsorship amount must meet \$100 program minimums.
- Matching Gifts disbursements are made on a monthly basis. Applications are evaluated and processed at the end of each month. Grants are paid at the end of the following month.

For example: A match request is submitted on March 4. The verification process begins April 1. If the organization's eligibility is confirmed and the donor's gift is verified, the match will be issued on the last business day of April.

Note: You can check on the status of your match request at cybergrants.nm.com.

- Donor/sponsor should clearly communicate and set expectations with nonprofit about match payment timing.
 - If match dollars are needed prior to the event, then the donor will need to request his/her match well in advance in accordance with the monthly match cycle.
- Matching gifts do not count toward fundraising totals for Race for Research.

Processing Matching Gift

1. FR pays the full cost of the fees and half of the charitable portion of an event sponsorship.
2. Use the following formula to calculate the FR's payment:
 - a. Take total sponsorship amount.
 - b. Subtract the value of the ticket(s)/seat(s) from that number.
 - c. Divide by 2.
 - d. Those equal portions represent the individual's charitable gift and the match amount.
 - e. As the donor, the FR portion is the charitable gift plus the non-tax- deductible amount.

Example: Sponsorship: \$1000

Fees: \$200

Charitable amount: \$800

FR pays: \$600 (\$200 in fees, \$400 of sponsorship)

Match amount: \$400

3. After the FR portion of the sponsorship has been determined, the FR should make their check out to the event account for the fee and his/her portion of the sponsorship.
4. After the network office has submitted the money from the event account and spreadsheet to ALSF, the FR should request his/her match through the online system at cybergrants.nm.com.
Note: Refer to the office's fundraising page ID (the numbers at the end of the URL) when making the match request.

Using Easy Match

1. Sign in to cybergrants.nm.com using single sign-on.
2. In the menu bar, click the Matching Gifts tab.
3. On the Matching Gifts tab, click Request a Match.
4. In the Organization Search field, type Alex's Lemonade Stand and click Search.
5. In the Search Results list, find Alex's Lemonade Stand Foundation with the address 111 Presidential Boulevard, Bala Cynwyd, PA, 19004 and click Select.
6. In the Donation Date field, type the date on which your donation was made.

USING MATCHING GIFTS

7. In the Tax-Deductible Gift Amount field, type the amount you want matched.
8. In the Gift Amount to Match field, type the same amount as entered in step 7.
9. In the Gift Payment Method field, select how you paid for the donation.
10. In the Purpose field, type your office's ALSF fundraising page ID.
11. Click Save and Proceed.
12. Review the information you entered and click Submit. The Confirmation page appears.
13. On the Confirmation page, read and follow the instructions provided.
Note: Match requests are evaluated and processed at the end of each month. Grants are paid at the end of the following month.