



AXA Foundation's Matching Gifts Form

Complete PART A and send both pages of this form with your donation to the organization receiving your contribution.

PART A

(to be completed by eligible AXA person)

Name _____

Business Address (include region) _____

City _____ State _____ Zip _____

Office Phone Number _____

Employee Number/Financial Professional Code _____

AXA Relationship (check one)

- Employee
- AXA Financial Professional (Production Club Member)
- Field Manager
- Board Member

Gift Is (check one)

- Unrestricted Amount of Gift \$ _____
- Restricted to: _____ Date of Gift ___ / ___ / ___
- AXA Disaster Relief Matching Gift \$ _____

Form of Gift Payment (check one)

- Cash, Check, Money Order, Credit Card
- Bonds or Shares of _____
- Life Insurance Premium

Note: No other forms of gifts are allowed.

I hereby certify that the above donation is entirely my personal contribution, and is not in whole or in part the gift of another individual or the sum of the gifts of other individuals. I also certify that all information is accurate, that contributions are not in lieu of tuition, fees, or other personal obligations, that I have not received any material, personal benefit in exchange for the gift, and that I have not been reimbursed by any party. In addition, I certify that I have read and understand and am in compliance with the guidelines of The AXA Foundation's Matching Gift Program. NOTE: The AXA Foundation reserves the right to obtain a copy of your paid check before or after the Matching Gift is made.

Signature of Contributor _____

PART B

(to be completed by an authorized officer of the recipient organization)

Please review program details on page 2 before certifying this contribution.

I hereby verify receipt of the above-stated contribution for the above individual and certify that the donation represents a charitable contribution for which the donor received no goods or services (i.e., tuition, dues credit, tickets, food/entertainment expenses, etc.) as determined for Federal income tax purposes. To the best of my knowledge, this gift is not, in whole or in part, the gift of another individual or the sum of gifts of other individuals.

Official Name of Organization Receiving This Gift _____

Address of Organization _____

City _____ State _____ Zip _____

Office Phone Number _____ Tax I.D. Number _____

Signature of Certifying Officer _____

Name of Certifying Officer (print) _____

Title _____

Amount of Gift Received \$ _____

Tax Deductible Amount \$ _____

Date Gift Received ___ / ___ / ___

Categories of Organization

(please check the most appropriate category)

- Education Civic/Community
- Health/Human Services Other
- Arts/Culture _____ (specify)

Please return this form to:

**AXA Foundation
Matching Gifts Administration
1290 Avenue of the Americas
New York, New York 10104**

AXA Foundation's Matching Gifts Form

The AXA Foundation's Matching Gifts Plan is an important resource for employees and financial professionals. It is designed to help you magnify the impact of your own giving, to leverage your community activities, and to be used as part of your agency-sponsored civic marketing projects.

Through the Matching Gifts Program, you are encouraged to contribute personally to non-profit organizations — and when you give, the AXA Foundation will give on your behalf.

Who's Eligible?

- Current, full-time employees with at least six months of continuous service at the time of the gift
- Current or retired AXA financial professionals who are either current Production Club members at the time of the gift or who were members as of December 31 of the year prior to the year in which the gift is made
- All active Field managers
- Current members of the board of directors

Which Organizations Are Eligible?

The AXA Foundation will match donations to most non-profit, tax-exempt, 501(c)(3) organizations that are public charities.

Which Organizations Are Not Eligible?

- Colleges and universities that are not recognized by one of the six accrediting associations
- Private Foundations
- Health care facilities that are not accredited general hospitals or hospices
- Religious organizations (unless the gifts are designated to an ongoing secular community services program sponsored by these organizations); political organizations; fraternal, professional, and social groups
- Organizations whose activities do not focus predominantly on the United States and its territories [see AXA Disaster Relief Matching Gifts, below]

What Are the Terms of the Program?

- The AXA Foundation will match all eligible gifts dollar-for-dollar.
- The donation must be made entirely from the personal funds of the AXA employee or financial professional whose signature is on the form, and not in whole or in part from any other individual within or outside the company.
- The minimum amount that will be matched is \$50 per individual.
- The annual maximum amount that will be matched is \$2,000 per individual.
- The \$2,000 maximum may be divided among eligible organizations or given to a single organization.
- If the gifts exceed the maximum in any year, the carry-over into succeeding years will not be permitted.

When there is any question about a gift's eligibility, the determination of AXA Foundation will be final.

AXA Disaster Relief Matching Gifts

- Supplemental to the standard Matching Gifts program.
- The AXA Foundation must designate the disaster as eligible
- All standard Matching Gifts program regulations apply, except:
 - The annual amount that will be matched is \$1,000 per individual
 - Contributions toward relief efforts outside the United States may be matched if the contribution is to a U.S.-based organization participating in the recovery effort

What Types of Gifts Are Eligible?

- Cash, check, money order, or credit card
- Securities with a quoted market value determined by the published bid price on the day the gift is made, or by the proceeds from sale by the recipient prior to submission of the Matching Gifts form. (The AXA Foundation match cannot constitute a portion of the securities payment.)
- Premiums on insurance policies of which the qualifying organization is an owner and beneficiary. Appropriate documents must be enclosed with the first such payment. (The AXA Foundation match cannot constitute a portion of the premium payment.)

What Types of Gifts Are Not Eligible?

- Testamentary bequests
- Dues and subscription fees
- Tuition fees, loan repayments, and payments in lieu of tuition
- Gifts to individuals or grouped and pooled donations, including donor advised funds
- Gifts in exchange for which the donor receives material benefit
- Any portion of a contribution that covers expenses for benefit dinners, golf tournaments, etc., because those benefits do not qualify as charitable donations under Federal income tax law
- Any gift which, in the opinion of the AXA Foundation, is not deductible by the donor for Federal income tax purposes

How to Participate

- The donor must complete Part A on the other side of this form. Please be sure that it is filled out completely; failure to do so delays processing of the match.
- Specify if you want your gift to be Restricted or Unrestricted. For Restricted Gifts, please indicate to which specific area or program of the organization you want your gift allocated. Unrestricted Gifts are allocated at the discretion of the organization.
- Mail the form and your contribution to the organization you have selected.
- The recipient organization must complete Part B of the form and return the entire form to the AXA Foundation.
- To be eligible for matching, your contribution must be acknowledged by the organization and the form received by the AXA Foundation no later than February 28 following the year in which the gift was made.
- Prior year forms received after February 28 will not be matched.

How to Get More Forms and Information

- Additional Matching Gifts forms may be obtained via the company Intranet, eDOX>AXA Foundation Resources folder or by calling 212.314.3213.
- Any questions regarding the Plan should be directed to Matching Gifts Plan Administration, AXA Foundation, 1290 Avenue of the Americas, New York, NY 10104 or you may call 212.314.3213 or fax 212.314.4480.
- The AXA Foundation reserves the right to discontinue or to amend the provisions of the Plan at any time without prior notice. The administration, interpretation and application of the provisions of the Plan are entirely within the discretion of the AXA Foundation, and all decisions will be final.