

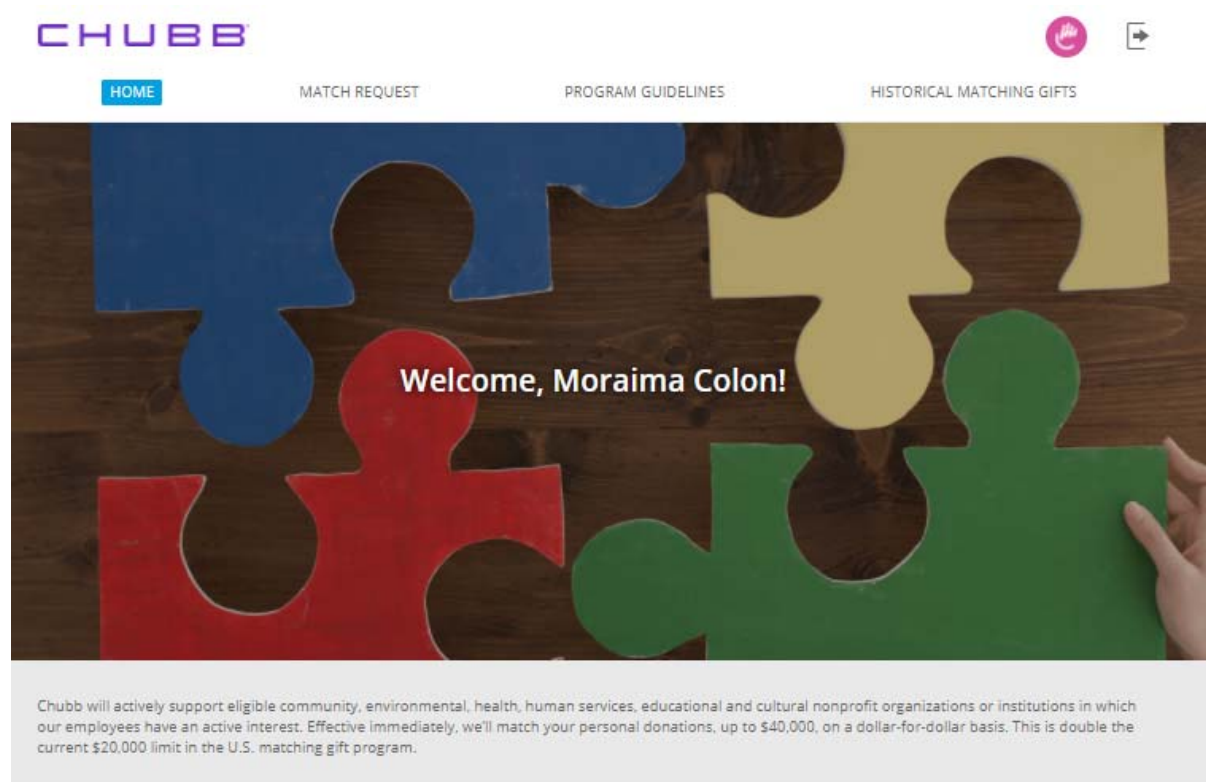


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## Chubb Matching Gifts Program

## Chubb Matching Gifts Home Page

When you click on the link on the Village, you will be presented with the matching gifts home page.



### Match Request

Register a matching gift for your donations given to eligible non-profit organizations.



### Historical Matching Gifts

Check out what you have done this year!



### Program Guidelines

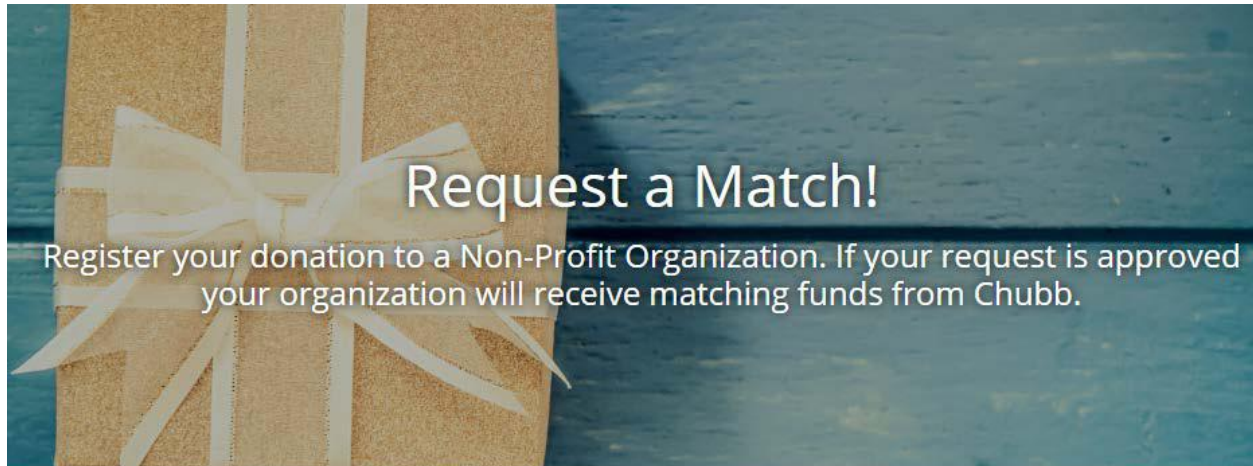
Review the Chubb Matching Gift Program guidelines.

## Requesting a Matching Gift

**Note:** All current full-time U.S. based employees are eligible to participate in this program. To receive a match, all U.S. employees **MUST** be employed by Chubb for **at least 6 months** at the time of the donation. You may submit donations, however, donations will not be matched until you have been employed at least 6 months.

1. On the home page, choose the **Match Request** image or **Match Request** from the navigation bar at the top of the screen.

- From the Match Request page, on the left side of the page, you can **Search for an Organization** or view your current **Matching Gift Balance**.
- On the right side of the page, you can view your **Pending Matching Gifts** or **Matching Gifts Giving History**.



### Searching for an Organization

To find your nonprofit's EIN number, click [here](#) to search Guidestar.

When entering an EIN number, please note the dash is required

Organization Tax ID or School/District ID:

OR

Organization Name:

State:

Pending Matching Gifts
Matching Gifts Giving History

Your history of previously submitted match requests and their current payment status are displayed below. If your organization has not yet confirmed their gift, please click into the gift link and email or print the receipt to the organization.

Find your gift date and amount registered under the 'Description' column. Your match amount is populated in the Status column.

Display activity for year: 2017 2015

Organization Information	Description	Status
THE RED SOX FOUNDATION INC	\$50.00 on 03/16/2017	Contribution has not been verified by the organization. Match Amount: \$50.00
4R ANIMAL SHELTER	\$50.00 on 03/13/2017	Contribution has not been verified by the organization. Match Amount: \$50.00

### Search for an Organization

- Enter the organization **Tax ID** or **School/District ID** or enter the **Organization Name, State and Country**.
- Choose **Search**.
- Find your organization. If your organization has a **Select** link in the Action column, you can choose this for a gift.
- Enter the **Gift Payment Method** (cash, check, credit card, stock.)

5. Enter the **Gift Date**.
6. Enter the **Total Amount Donated**. (gifts less than \$25 are not eligible for a match)
7. Enter the **Tax-Deductible Value of your Gift**.
8. Enter the **Classification of Organization Supported** A link is provided with details on the Gift Types and their descriptions.
9. Enter a **Designation** to specify a specific department or school the gift is intended for.
10. Chose an option to describe the **Program Funded**.
11. Answer Yes or No to **Disaster Gift** if the gift is for disaster relief effort.
12. Read the **Confirmation of Matching Gift Agreement** and if you agree, check the **I Agree** box in order to **Save and Proceed** button with the request.

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Donor Matching Gift Information

Review Information

You are almost done!

**Review Information**

Please review your gift information. If you need to change any of the information, please select the "make a change" button. Clicking the Submit button will bring you to the Nonprofit confirmation instructions.

**THE RED SOX FOUNDATION INC**  
 4 YAWKEY WAY  
 BOSTON, MA 02215-3409  
 E-mail Address: [rmochizuki@redsox.com](mailto:rmochizuki@redsox.com)  
 Website Address: <http://www.redsoxfoundation.org>  
 U.S. Tax ID/EIN: 331007984

**Donor Matching Gift Information**

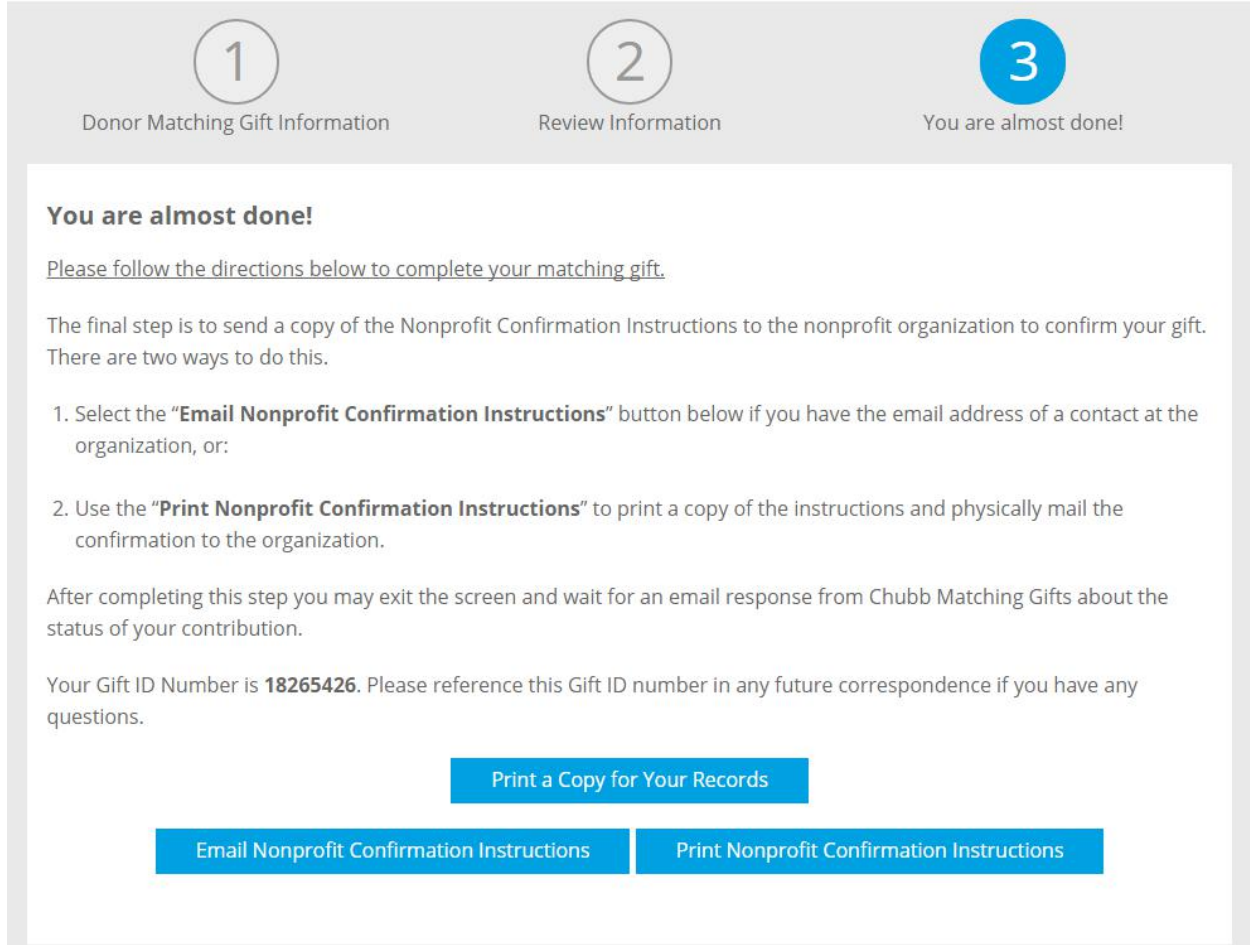
*Gift Payment Method	Cash
*Gift Date	03/16/2017
Total Amount Donated	\$25
*The Tax Deductible Value of your Gift	\$25.00
Classification of Organization Supported (?)	COMMUNITY DEVELOPMENT
Designation	
Disaster Gift	No
*Confirmation of Matching Gift Agreement:	I Agree

Submit

Make a Change

Return to Home Page

13. On the confirmation page, review the matching gift information.
14. Choose **Make a Change** button to return to the previous step or choose **Submit** to send in your donation.
15. After choosing **Submit**, you are presented with the Nonprofit Confirmation page.



The screenshot shows a progress bar at the top with three steps: 1. Donor Matching Gift Information, 2. Review Information, and 3. You are almost done! (highlighted in blue). Below the progress bar, the heading "You are almost done!" is followed by instructions: "Please follow the directions below to complete your matching gift." and "The final step is to send a copy of the Nonprofit Confirmation Instructions to the nonprofit organization to confirm your gift. There are two ways to do this." Two numbered steps are listed: 1. Select the "Email Nonprofit Confirmation Instructions" button... or 2. Use the "Print Nonprofit Confirmation Instructions" to print a copy... After these instructions, a paragraph states: "After completing this step you may exit the screen and wait for an email response from Chubb Matching Gifts about the status of your contribution." Another paragraph provides the Gift ID Number: "Your Gift ID Number is 18265426. Please reference this Gift ID number in any future correspondence if you have any questions." At the bottom, there are three buttons: "Print a Copy for Your Records" (top), "Email Nonprofit Confirmation Instructions" (bottom left), and "Print Nonprofit Confirmation Instructions" (bottom right).

16. Here you can print out a copy of the donation for your records with **Print a Copy for Your Records** button.
17. You also need to either:
  - a. Select the **Email Nonprofit Confirmation Instructions** button if you have the email address of a contact at the organization, or:
  - b. Use the **Print Nonprofit Confirmation Instructions** to print a copy of the instructions and physically mail the confirmation to the organization.
18. After completing this step, you may exit the screen and wait for an email response from Chubb Global Corporate Giving about the status of your contribution.

## Donor Balance

This includes the total number of match request transactions.



Once you have reached the maximum match limit for the year, you will see the Employee Giving Balance below as \$0.00.

2017 Donor Balance
2016 Donor Balance

### Your 2017 Matching Gift Balance

This includes your match requests up to \$20,000 per year.

Once you have reached the maximum match limit for the year, you will see the Employee Giving Balance below as \$0.00.

Employee Giving	
Matching Gifts	
Number of Transaction(s):	3
Total Match Amount:	\$125.00
<b>Employee Giving Balance:</b>	<b>\$19,875.00</b>

### Your Previous Years' Balance

Here you can see your giving balance from the previous year, number of transactions and total match amount.

2017 Donor Balance
2016 Donor Balance

Employee Giving	
Matching Gifts	
Number of Transaction(s):	0
Total Match Amount:	\$0.00
<b>Employee Giving Balance</b>	<b>\$20,000.00</b>

### Pending Matching Gifts

This section shows your history of previously submitted match requests and their current payment status.

[Pending Matching Gifts](#)

[Matching Gifts Giving History](#)

Your history of previously submitted match requests and their current payment status are displayed below. If your organization has not yet confirmed their gift, please click into the gift link and email or print the receipt to the organization.

Find your gift date and amount registered under the 'Description' column. Your match amount is populated in the Status column.

Display activity for year: [2017](#) [2015](#)

Organization Information	Description	Status
THE RED SOX FOUNDATION INC	\$25.00 on 03/16/2017	Contribution has not been verified by the organization. Match Amount: \$25.00
4R ANIMAL SHELTER	\$50.00 on 03/13/2017	Contribution has not been verified by the organization. Match Amount: \$50.00
A RED THREAD ADOPTION SERVICES INC	\$50.00 on 02/27/2017	Contribution has not been verified by the organization. Match Amount: \$50.00
ELAINES FOUNDATION FOR HOMELESS FELINES	\$25.00 on 01/11/2017	Contribution has not been verified by the organization. Match Amount: \$25.00

If your organization has not yet confirmed their gift, please click into the gift link (the **Description** field) and email or print the receipt to the organization.

### Matching Gifts Giving History

Your history of previously submitted match requests and their current payment status are displayed. All gifts here have been confirmed, Paid or scheduled for payment.

#### What Does My Status Label Mean?

**Contribution has not been verified by the organization.** - Your nonprofit has yet to confirm your donation in the portal. You can always resend them the confirmation instructions via email or mail by clicking on your specific gift in the Description Category.

**Contribution has been verified but not yet paid.** - Your gift has been verified by your nonprofit and approved by Chubb's Global Corporate Giving department. It will be paid out after the quarter closes.

**Contribution has been rejected.** - Your gift cannot be matched by Chubb. Please contact [Mori Colon](#) if you require more information

**Matching funds of \$ have been Paid.** - Your gift has been paid out to the nonprofit.

[Pending Matching Gifts](#)

**[Matching Gifts Giving History](#)**

Your history of previously submitted match requests and their current payment status are displayed below. All gifts here have been confirmed, Paid or scheduled for payment.

Find your gift date and amount registered under the 'Description' column. Your match amount is populated in the Status column.

Organization Information	Type	Description	Status
NEW ENGLAND REGIONAL HOMELESS MANAGEMENT INFORMATION SERVICE	Matching Gifts	\$50.00 on 06/17/2015	Contribution has been verified, but not yet paid. Your Matching Gift is \$50.00.
CYBERGRANTS TEST ORGANIZATION	Matching Gifts	\$100.00 on 04/13/2015	Matching funds of \$100.00 have been Paid.
MASSACHUSETTS SOCIETY FOR THE PREVENTION OF CRUELTY TO ANIMALS	Matching Gifts	\$50.00 on 03/25/2015	Contribution has been verified, but not yet paid. Your Matching Gift is \$50.00.
MASSACHUSETTS SOCIETY FOR THE PREVENTION OF CRUELTY TO ANIMALS	Matching Gifts	\$50.00 on 03/25/2015	Matching funds of \$50.00 have been Paid.

## Viewing your Gift History

- On the home page, choose the **History** image or **Historical Matching Gifts** from the navigation bar at the top of the screen.

Your history of previously submitted match requests and their current payment status are displayed. Click on the **Create New** link in the Action column to create another match request for the same organization. If your organization has not yet confirmed their gift, please click the gift link and email or print the receipt to the organization.

## Viewing the Program Guidelines

- On the home page, choose the **Program Guidelines** image or **Program Guidelines** from the navigation bar at the top of the screen.
- The Program Guidelines page describes the eligibility requirements for the Chubb Matching Gifts Program.