

Apply for a Matching Gift Job Aid



This job aid will help associates search for organizations and apply for a matching gift.

This job aid was updated on April 19, 2021 and is for internal State Farm use only. This document contains information that may not be disclosed outside State Farm without authorization.

Note: Associates may apply to match donations of at least \$25 made to qualifying organizations. Please review the Matching Gift Guidelines before submitting an application for a Matching Gift.

When

Associates have donated at least \$25 to a qualifying organization and would like the State Farm Companies Foundation to match the tax deductible portion of their donation.

Note: **Matching gift applications must be submitted by January 31st of the year following your donation.**

Who

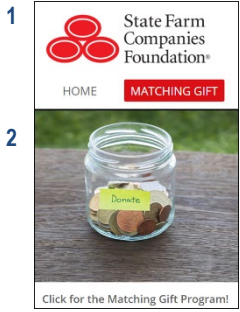

This job aid is intended for all users of the Matching Gift/Good Neighbor Grant[®] site.

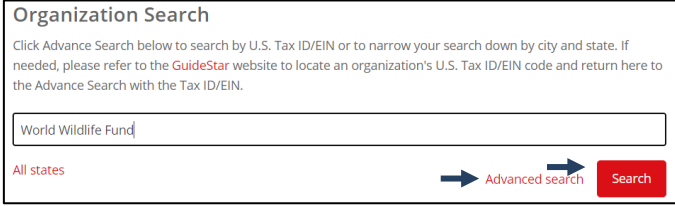

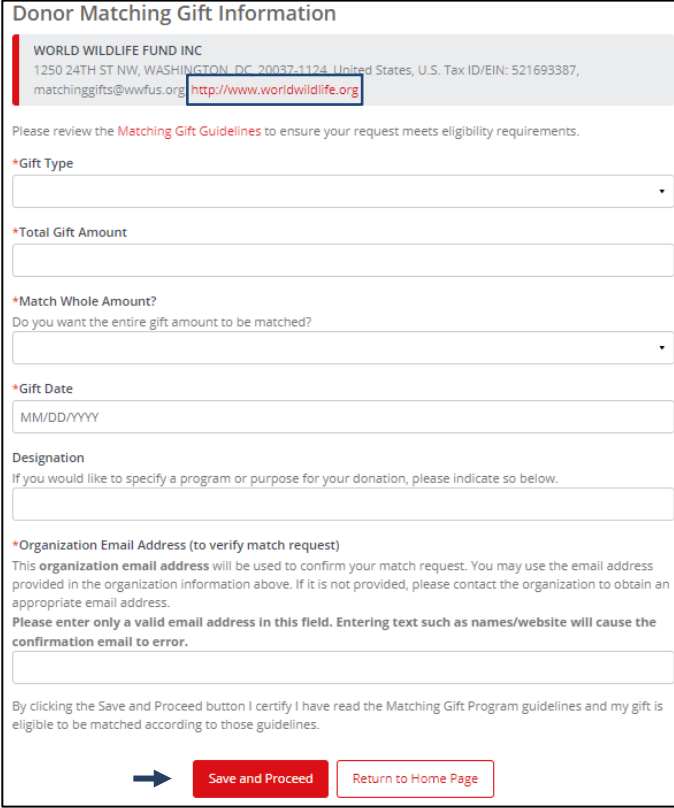
How

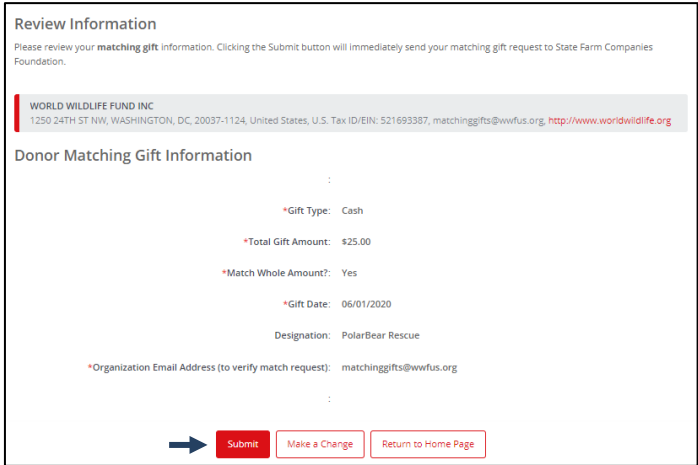
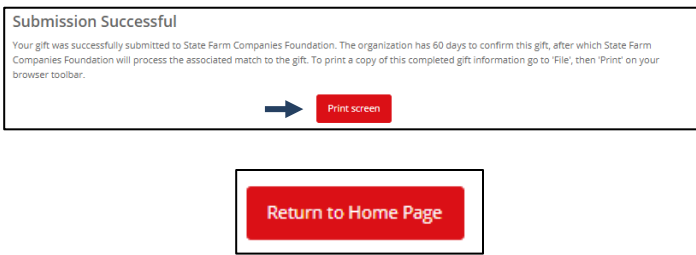
Before starting this process, you may need to gather some important information.

- Organization's U.S. Tax ID or EIN number (9 digits, all numbers)
- K-12 School's NCES ID
- Correct organization, school or college/university name, address and contact email

Review the [Additional Information](#) section for assistance in finding this information.


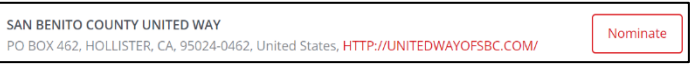
1) Click one of the matching gift links.	 <p>1</p> <p>2</p> <p>Click for the Matching Gift Program!</p>
2) Click the Matching Gift button.	 <p>Matching Gift Program</p> <p>State Farm Companies Foundation will match eligible donors' charitable contributions (tax deductible portion) to eligible nonprofit organizations and two or four year U.S. colleges and universities. Donors can submit matching gifts and/or payroll deductions to more than one organization. Matching gifts can be a minimum of \$25 and up to a maximum of \$4,500 per calendar year.</p> <p>→ Matching Gift Matching Gift Payroll Deduction</p>

<p>3) Enter the organizations name in the search field, click the Submit button.</p> <p>If you have the organizations US Tax ID/EIN or K-12 schools NCES ID, use Advanced Search to search for the organization.</p>	
<p>4) Scroll through the Search Results and click the Select button next to the organization name.</p>	
<p>5) Click the Gift Type drop down and select the method in which the gift (donation) was made.</p> <p>6) Enter the gift amount in the Total Gift Amount field.</p> <p>7) Click the Match Whole Amount dropdown.</p> <ul style="list-style-type: none"> • Select Yes to match the total gift amount. • Select No if a portion of your gift is not considered tax deductible. Enter the amount that is tax deductible in the Match Amount Request field. <p>8) Enter the Gift Date. Clicking the field will bring up a calendar for you to select the date.</p> <ul style="list-style-type: none"> • Remember you cannot request matching gifts for future donations. <p>9) Enter the specific program or purpose of your gift in the Designation field.</p> <p>10) Enter the email address of the organization contact in the Organization Email Address field.</p> <ul style="list-style-type: none"> • The email notification to confirm your gift amount will be sent to the email address entered here. If you do not have an email address, you may use the one provided in the organization information above. If it is not provided, please contact the organization to obtain an appropriate email address. <p>11) Click the Save and Proceed button.</p>	

<p>12) Review your application.</p> <ul style="list-style-type: none"> • If everything is correct, click the Submit button. • If you need to make a change, click the Make a Change button. This will take you back to the application. Enter any necessary corrections and click the Save and Proceed button. 	
<p>13) From the Submission Successful screen you can click the Print Screen button to print a hard copy of your application for your records.</p> <ul style="list-style-type: none"> • You will also receive an email from State Farm Companies Foundation confirming your gift application. <p>14) Click the Return to Home Page button at the bottom of the screen to return to the Welcome screen.</p>	

Additional Information

- To search for an organization's U.S. Tax ID or EIN (Employer Identification Number) use the IRS Database ([Link](#)) or Charity Navigator ([Link](#)). These sites may also provide correct contact information.
- To search for a K-12 school's NCES ID use the National Center for Education Statistics site ([Link](#)).
- You may also reach out to the organization, school or college/university to request any of the information required to complete a Matching Gift application.

<p>Your organization search may return multiple results. Click View More to display additional results.</p> <p>Scroll through the results until you find the organization that matches with organization name, address, and Tax ID/EIN or NCES number.</p> <p>Click the Select button to move the Donor Matching Gift Information page.</p>	
<p>If an organization has not had a previous matching gift or payroll deduction, the organization will have a Nominate button. See the "How do I nominate an organization for a matching gift?" job aid.</p>	

If you encounter any issues completing the Matching Gift Application, call the State Farm Companies Foundation support line at 1-877-369-0872.