Regions Matching Gifts Program for Retirees

Support your favorite school or arts and cultural organization, and Regions will double eligible donations with a one-to-one monetary matching gift.

At Regions, putting people first and making life better are more than mere catchphrases, they’re essential aspects of our corporate culture and philosophy. Our associates and retirees consistently put people first, setting themselves apart as caring citizens and establishing Regions as dedicated to the communities we serve.

To honor your financial gift, Regions is proud to provide additional support to eligible organizations through the Regions Matching Gifts Program.
Who Can Participate
Recent retirees of Regions (for up to five years after retirement) and its affiliated companies are eligible for the Matching Gifts Program.

Matching Guidelines
Regions will match retiree tax-deductible donations of $25 or more, up to a total of $1,000 per year. Matching requests must be received from the recipient organization no later than June 30th of the next calendar year (e.g., eligible gifts made between January 1, 2020 and December 31, 2020 must be submitted no later than June 30, 2021).

Eligible Organizations
Regions contributes to the success of many charitable organizations across our footprint through grants, sponsorships, and United Way campaigns. To complement these contributions, the Regions Matching Gifts Program focuses on supporting two types of organizations:

Accredited Educational Institutions — Preschool through 12th grade public and private schools, and public or private colleges and universities. These institutions may be located anywhere in the United States.

Local Arts and Cultural Nonprofit Organizations — Art, historical and science museums, zoos, botanical gardens, performing arts groups, libraries, public radio and television. Arts and cultural organizations must be located in one of the states where Regions currently does business and must qualify for federal income tax exemption under Section 501(c)(3) or 170(c) of the Internal Revenue Code.

How To Apply

Regions Retirees:
• Complete Section A of the Matching Gifts Application.
• Send the entire application, along with your contribution, to the recipient school or nonprofit tax-exempt organization.

Recipient Organization:
• Verify receipt of donation.
• Complete required documentation by visiting www.regions.com/matchinggifts and upload the Matching Gifts Application, along with proof of federal tax exception status and most recent IRS W-9 form.

Restrictions: The following will not be matched —
• Donations of less than $25
• Athletic support of any kind
• Donations to health-related causes
• Donations from which the retiree derives a tangible benefit
• Donations of real estate or personal property (only monetary contributions)
• Donations collected from sources other than the retiree signing the application
• Donations from a retiree’s spouse or family members
• Donations to organizations that engage in illegal or discriminatory practices
• Tuition payments, books and other student fees

Recipient organizations must be located in the Regions footprint (except for accredited educational institutions, which may be located anywhere in the United States). Regions retains the right to decide the eligibility of any matching gift application on a case-by-case basis. Effective October 15, 2019, only requests submitted within 12 months of the gift date will be paid.
Regions Matching Gifts Application

**A. To be filled out by the Regions retiree making a donation** (please type or print legibly)

- Retiree’s Name
- Retiree’s Corporate ID (during employment)
- Email Address
- Phone Number
- Date of Retirement
- City / State / Zip Code
- Name of Organization Receiving Gift
- Gift Amount
- Amount to be Matched

**Type of Organization (check one):** Must have a primary mission that clearly fits one of these categories and must qualify for federal income tax exemption under Sections 501(c)(3) or 170(c) of the Internal Revenue Code:

- **Accredited Educational Institutions:** Preschool through 12th grade public and private schools, and public or private colleges and universities. These institutions may be located anywhere in the United States.
- **Local Arts and Cultural Nonprofit Organizations:** Art, historical and science museums, zoos, botanical gardens, performing arts groups, libraries, public radio and television. Arts and cultural organizations must be located in one of the states where Regions currently does business.

- Retiree’s Signature
- Date of Gift

Retiree must give completed form to donor organization for the verification and processing.

**B. Organization must complete required documentation by visiting** [www.regions.com/matchinggifts](http://www.regions.com/matchinggifts).

For questions, please email matching@regions.com.