

Committed to Community

OUR GIVING PHILOSOPHY

M3's founder, Loren Mortenson, began a legacy of giving back to the communities in which we live and work, and that legacy continues today. Our employees are actively engaged in causes they care about, and M3 is as well. M3 concentrates its charitable giving on programs that align with our business practices and goals. Therefore, our time, talents and resources are most often focused on causes within four categories: **1. health improvement, 2. safety improvement/catastrophic event relief, 3. personal financial education, and/or 4. insurance industry education.**



GUIDELINES FOR GIVING

- Giving will be focused in our market area—the areas around M3 offices and the state of Wisconsin.
- Giving will be used to support organizations with causes that:
 - Are important to our employees
 - Are important to our clients
 - Support the communities where we live and work
 - Have a health improvement component, or
 - Have a catastrophic events relief/safety component, or
 - Promote personal financial education, or
 - Promote insurance industry education

CHARITABLE GIVING COMMITTEE PROCESS

A committee of M3 employees determines our corporate gifts each year. The committee, which meets 2-3 times per year, is comprised of a cross section of our employee group, representing different functional areas as well as geographic locations.

The calendar for this committee is:

- December 31st —donation request deadline
- February 15th —determine charitable giving for the current year and notify requestors.

All requesting organizations will receive a response to their request following the February 15th committee meeting.

ELIGIBLE ORGANIZATIONS

Organizations must be a 501(c)(3) institution and must be nonpolitical and nondiscriminatory. M3 will **not** make charitable contributions to the following entities:

- Individuals
- Agencies that discriminate on the basis of race, color, creed, sexual orientation or national origin
- Political causes, candidates, legislative lobbying or advocacy groups
- Religious organizations seeking to further a denominational or sectarian purpose
- Social, labor, alumni or fraternal organizations serving a limited constituency
- Special occasion, good-will and single-interest magazines
- Local athletic or sports programs and little leagues
- Travel funds for tours, expeditions or trips

We appreciate all that is done in our communities. Thank you for making our area a better place to live and work.

Charitable Giving Application



ORGANIZATION INFORMATION

DATE

ORGANIZATION NAME

FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN)

CONTACT PERSON, TITLE

ADDRESS

CITY STATE ZIP

TELEPHONE

EMAIL

SEND COMPLETED FORM TO:
M3 INSURANCE
C/O CHARITABLE GIVING COMMITTEE
PO BOX 8950
MADISON, WI 53708-8950

PLEASE ATTACH IRS 501(c)(3) LETTER.

CONTRIBUTION REQUEST

PROJECT NAME

CHECK BOX(ES)

VOLUNTEER REQUEST NUMBER

MONETARY GIFT REQUEST AMOUNT

BRIEF PROJECT DESCRIPTION

GEOGRAPHIC AREA SERVED

PROJECT BUDGET

SIGNIFICANT FUNDING SOURCES

ADMINISTRATIVE COST AS % OF BUDGET

