



Caterpillar Employee United Way Appeal

2021 U.S. Retiree Step by Step Pledging Guide

Log In Page



- Visit www.caterpillar.com/unitedway and click the “Retiree” Pledge Link
- Login as an existing user if you’ve utilized the Caterpillar Cares portal before. This is the same credentials you use for year-round matching gifts and volunteerism.
- If not, click the “**First time user? Create your password**” link to proceed.
- Email CEUWA_Cat@cat.com with questions.

Login/Acceptance Terms



If you've never
used the site
before

Returning
users

Log In

CATERPILLAR CARES PORTAL

Current Caterpillar/Solar Employees: Use *Single Sign On* link below.

Click here to log in with Single Sign On (CWS ID/Password)

U.S. Retirees, Caterpillar/Solar Production Employees, Progress Rail Employees, Mexico Employees: Use *Standard Log In* below.

STANDARD LOG IN:

Employee ID Number: Caterpillar/Solar HR ID (formerly known as PeopleSoft ID) or Progress Rail ID

Password for U.S. Retirees: Use password you created when registering.
Password for U.S. Production & Progress Rail Employees: First+Last Initial+Home Zip Code. Initials must be capitalized (ex: JT12345).
Password for Mexico Employees: mexico2021

First time user? [Create your password](#)

Show password

Log In

[Forgot your password?](#)

Please note that you must have cookies and JavaScript enabled on your browser in order to successfully log in.

CATERPILLAR FOUNDATION EMPLOYEE ENGAGEMENT PROGRAM ACCEPTANCE TERMS

Please review all program rules and restrictions. You must accept the program guidelines by clicking I ACCEPT at the bottom of the page.

MATCHING GIFTS PROGRAM GIFT ELIGIBILITY REQUIREMENTS

Each Caterpillar participant may request an **annual combined total maximum match of \$10,000 USD** (or local currency equivalent) in each calendar year.

ELIGIBLE GIFTS MUST BE:

- Tax-deductible, charitable contribution of \$25 USD (or local currency equivalent) or more per eligible organization.
- Current contributions made directly by the Caterpillar participant to the eligible organization from the Caterpillar participant's own assets. Participants may not register funds collected from others.
- Made/donated in full, not merely an unsatisfied pledge.
- Made via cash, check, debit/credit card or marketable securities. Gifts may also be made from an entity such as a personal foundation or donor advised fund if that entity has been funded solely by the eligible Caterpillar participant.
- Employees must submit matching gift requests online by January 31 of the year following the donation and nonprofits must then verify gift online by February 15 of the year following the donation in order to be eligible for the Foundation match.

ELIGIBLE ORGANIZATIONS MUST BE ONE OF THE FOLLOWING (excluding noted *Ineligible Nonprofit Organizations & Gifts*):

U.S. Charitable Organizations that are:

- Recognized by and registered with the United States I.R.S. as a current 501(c)(3) nonprofit organization; or
- Accredited public/private preK-12 schools or school districts in the United States to which contributions are tax deductible under the Internal Revenue Code of the United States.

Charitable organizations in countries outside the U.S. that are recognized by and registered with one of the following:

- United Kingdom Charity Commission as a charitable organization; or
- Charities Aid Foundation-America as a charitable organization; or
- Australian Business Register; or
- Canadian Charities Directorate.

Please note that all organizations and gifts are reviewed on an ongoing basis to determine compliance with guidelines and eligibility for matching. Inclusion in the system is not necessarily a guarantee of eligibility.

U.S. VOLUNTEER SIGN UP AND TRACKING

Sign up to participate in Caterpillar sponsored volunteer events and log your volunteer hours at any 501(c)(3) nonprofit or NCES coded school.

2021 U.S., MEXICO & CANADA UNITED WAY CAMPAIGN (AUGUST 17 - SEPTEMBER 24)

- All United Way pledges submitted in the United Way Campaign portal will be automatically matched by the Caterpillar Foundation with no cap. The Foundation match of your pledge follows to the local United Way you select.
- Eligible nonprofits include any United Way chapter, focus area, or United Way funded partner agency that is visible within the United Way pledging portal.

DATA PRIVACY

Information provided to Caterpillar is processed consistent with Caterpillar's Data Privacy Policy. This information will be used to process the gift and may be used to contact you in the future regarding Caterpillar Foundation Matching Gift Program and United Way updates and surveys. Notwithstanding the above disclosure, we will provide personal information when required or permitted by law or for purposes relevant to Corporate Policies. For year-round matching gifts, the Caterpillar Foundation does not provide nonprofits with employee mailing address information but the participant's name, gift details and email address (in some instances) will be sent to the nonprofit for match request verification purposes only. For United Way pledge processing, your personal information (name, home address, email address and pledge details) may be provided to your local United Way chapter if you opt to release this information in your pledge submission (you have the option to remain anonymous). By providing this information you agree to the above uses of your information. Please also see the Privacy Policy for the Caterpillar Foundation's third-party vendor, CyberGrants, to view information on how your personal information is used, as well as how cookies are being set on your device: [CyberGrants Privacy Policy](#)

By clicking I accept below, I agree to the terms of these program guidelines and acknowledge that the information I provide is truthful and accurate.

I ACCEPT

I DO NOT ACCEPT

Click Pledge Now or 2021 United Way Campaign Tab



Home [2021 United Way Campaign](#) Match Requests Disaster Relief Volunteer Opportunities Log Volunteer Hours

Erika Kempf

Welcome, Erika Kempf!

Our annual United Way Campaign is underway! Through September 24, pledges made to any United Way or funded partner agency will be automatically matched dollar-for-dollar with no cap. Let's make a difference!

CLICK TO PLEDGE NOW



Review Pledge Options

[2021 United Way Campaign](#) [Match Requests](#) [Disaster Relief](#) [Volunteer Opportunities](#) [Log Volunteer Hours](#)

CATERPILLAR EMPLOYEE UNITED WAY APPEAL
LIVE UNITED 

**SUBMIT NEW PLEDGE
OF \$1 OR MORE**



The Caterpillar Foundation will automatically **match your pledge dollar-for-dollar!**

Retirees have three payment options:

1. Credit/debit card
2. Stock/donor-advised fund
3. Check/cash

Credit Card Donation

Please select one of the following:



One-Time Credit Card Donation

One-time deduction occurs immediately



Stock/Donor-Advised Fund Donation

Fulfill donation anytime in 2021 or 2022



Check/Cash Donation

Fulfill donation anytime in 2021 or 2022

Close

Credit Card Donation

Credit Card Donation Information

If you want to donate to more than one United Way, please submit a second credit card pledge after completing this transaction.

Heart of Illinois United Way
HEART OF ILLINOIS UNITED WAY INC
509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504

Gift Payment Method

Credit Card

*Total Gift Amount

Enter the amount you'd like to deduct from your credit card today.

Credit Card Donation



Choose how you'd like to invest your donation.

Below is the United Way and focus areas/programs within the United Way that align to your home zip code. If you want to switch United Way chapters, scroll to the bottom of the page. You may give your full donation to one United Way, Focus Area or United Way partner agency or divide it among several.

To view partner agencies that are eligible for designation, click the drop-down link below to select and "Add" an agency to your displayed donation distribution list below:

Add

Heart of Illinois United Way

\$

211

\$

COVID-19 Relief Fund

\$

Education

\$

Financial Stability

\$

Health

\$

Success By Six

\$

Supporting Student Success (S3)

\$

Total

0

Negative Designation

If you do not want a particular United Way funded partner agency to receive a portion of your gift, please indicate the agency below. Otherwise, leave blank.

If you select you'd like \$10 to deduct your first paycheck in previous step, you would enter \$10 into the allocation chart

To view partner agencies that are eligible for designation, click the drop-down link below to select and "Add" an agency to your displayed donation distribution list below:

Alzheimer's Association-Central Illinois
American Red Cross - Central IL Chapter
Big Brothers Big Sisters, Heart of Illinois
Boy Scouts of America W.D. Boyce Council
Boys' & Girls' Clubs of Grtr Peoria Inc
CASA of the 10th Judicial Court
Center For Prevention Of Abuse
Center For Youth And Family Solutions
Central Illinois FRIENDS of PWA
Children's Home Association of Illinois
Common Place
Community Workshop & Training Center
Crittenton Centers
Dream Center
EPIC
EasterSeals Central Illinois
FamilyCore
Freedom House
G.W. Carver Association, Inc.

If an employee designates to an agency from the drop down, there is a **\$25 annual minimum per partner agency (\$1 minimum per United Way or focus area)**

Credit Card Donation



*United Way and Partner Agency Privacy Preference

*Caterpillar Privacy Preference (?)

Check the box below if your pledge qualifies for Caterpillar Builder's Circle Leadership Giving Society

☐ I donated \$1,000+ or 1%+ of my annual salary.

Save and Proceed

Return to Home Page

Privacy Preferences

*United Way and Partner Agency Privacy Preference

I authorize you to share my name, email, and address with the nonprofit for processing/recognition.
I opt to remain anonymous. When you process my pledge do not send any personal info to United Way.

Privacy Preferences

*United Way and Partner Agency Privacy Preference

*Caterpillar Privacy Preference (?)

I authorize release of my name to the CAT CEUWA planning team for internal incentives/recognition.
I opt to remain anonymous. Do not release my name internally.

Credit Card Donation



Review Information

You're almost done! Review your pledge details and enter your billing and credit card information below. Then click Submit to complete your donation. Credit/debit card donations will be processed automatically and cannot be edited/changed after submission.

Heart of Illinois United Way
HEART OF ILLINOIS UNITED WAY INC
509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504

Credit Card Donation Information

Gift Payment Method

Credit Card

*Total Gift Amount

\$50.00

Negative Designation

*United Way and Partner Agency Privacy Preference

I authorize you to share my name, email, and address with the nonprofit for processing/recognition.

*Caterpillar Privacy Preference [\(?\)](#)

I authorize release of my name to the CAT CEUWA planning team for internal incentives/recognition.

Check the box below if your pledge qualifies for Caterpillar Builder's Circle Leadership Giving Society

*Address:

*City:

*State/Province:

*Zip/Postal Code:

Credit Card Donation



Credit Cards Accepted:



*Credit Card Number:

(no spaces or dashes)

*Expiration Date (MMYY):

*CVV

(Visa, Mastercard, and Discover: three digit CVV number on the back of the card. American Express: four digit CVV number on the front of the card)

You will be charged immediately. This charge will appear on your statement as CYBERGRANTS DONATION SERV.



Submit

Make a Change

Return to Home Page

Credit Card Donation



Submission Successful

Your credit card donation was successfully processed and will be automatically matched by the Caterpillar Foundation. No additional action is needed!

Download your certificate of participation: [View Participation Certificate](#)

Take a quick survey: [United Way survey](#)

Print Pledge Summary

Heart of Illinois United Way
HEART OF ILLINOIS UNITED WAY INC
509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504

Credit Card Donation Information

Gift Payment Method Credit Card

*Total Gift Amount \$50.00

Negative Designation

*United Way and Partner Agency Privacy Preference I authorize you to share my name, email, and address with the nonprofit for processing/recognition.

*Caterpillar Privacy Preference (?) I authorize release of my name to the CAT CEUWA planning team for internal incentives/recognition.

*Address: 6802 N Basket Oak Dr

*City: Edwards

*State/Province: IL

*Zip/Postal Code: 61528

*Credit Card Number: 5230

*Expiration Date (MMYY): 0222

Return to Home Page

Stock/Donor-Advised Fund Donation

Please select one of the following:



One-Time Credit Card Donation

One-time deduction occurs immediately



Stock/Donor-Advised Fund Donation

Fulfill donation anytime in 2021 or 2022



Check/Cash Donation

Fulfill donation anytime in 2021 or 2022

Close

Stock/Donor-Advised Fund Donation

Stock/Donor Advised-Fund Donation Information

Heart of Illinois United Way
HEART OF ILLINOIS UNITED WAY INC
509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504

*Projected Transfer Date

The date you plan to transfer the stock or initiate the transfer from your donor advised fund to the organization.

MM/DD/YYYY

* Total Gift Amount

Enter the amount you plan to transfer to United Way on the date above.

Stock/Donor-Advised Fund Donation



Choose how you'd like to invest your donation.

Below is the United Way and focus areas/programs within the United Way that align to your home zip code. If you want to switch United Way chapters, scroll to the bottom of the page. You may give your full donation to one United Way, Focus Area or United Way partner agency or divide it among several.

To view partner agencies that are eligible for designation, click the drop-down link below to select and "Add" an agency to your displayed donation distribution list below:

Add

Heart of Illinois United Way

\$

211

\$

COVID-19 Relief Fund

\$

Education

\$

Financial Stability

\$

Health

\$

Success By Six

\$

Supporting Student Success (S3)

\$

Total

0

Negative Designation

If you do not want a particular United Way funded partner agency to receive a portion of your gift, please indicate the agency below. Otherwise, leave blank.

If you select you'd like \$10 to deduct your first paycheck in previous step, you would enter \$10 into the allocation chart

To view partner agencies that are eligible for designation, click the drop-down link below to select and "Add" an agency to your displayed donation distribution list below:

Alzheimer's Association-Central Illinois

American Red Cross - Central IL Chapter

Big Brothers Big Sisters, Heart of Illinois

Boy Scouts of America W.D. Boyce Council

Boys' & Girls' Clubs of Grtr Peoria Inc

CASA of the 10th Judicial Court

Center For Prevention Of Abuse

Center For Youth And Family Solutions

Central Illinois FRIENDS of PWA

Children's Home Association of Illinois

Common Place

Community Workshop & Training Center

Crittenton Centers

Dream Center

EPIC

EasterSeals Central Illinois

FamilyCore

Freedom House

G.W. Carver Association, Inc.

If an employee designates to an agency from the drop down, there is a **\$25 annual minimum per partner agency (\$1 minimum per United Way or focus area)**

Stock/Donor-Advised Fund Donation



*United Way and Partner Agency Privacy Preference

*Caterpillar Privacy Preference (?)

Check the box below if your pledge qualifies for Caterpillar Builder's Circle Leadership Giving Society

☐ I donated \$1,000+ or 1%+ of my annual salary.

Save and Proceed

Return to Home Page

Privacy Preferences

*United Way and Partner Agency Privacy Preference

☒ I authorize you to share my name, email, and address with the nonprofit for processing/recognition.
☐ I opt to remain anonymous. When you process my pledge do not send any personal info to United Way.

Privacy Preferences

*United Way and Partner Agency Privacy Preference

*Caterpillar Privacy Preference (?)

☒ I authorize release of my name to the CAT CEUWA planning team for internal incentives/recognition.
☐ I opt to remain anonymous. Do not release my name internally.

Stock/Donor-Advised Fund Donation



Review Information

You're almost done! Review your donation and click Submit to complete your pledge.

Heart of Illinois United Way
HEART OF ILLINOIS UNITED WAY INC
509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504

Stock/Donor Advised-Fund Donation Information

*Projected Transfer Date: 09/02/2020

* Total Gift Amount: \$50.00

Negative Designation:

*United Way and Partner Agency Privacy Preference: I authorize you to share my name, email, and address with the nonprofit for processing/recognition.

*Caterpillar Privacy Preference (?) I authorize release of my name to the CAT CEUWA planning team for internal incentives/recognition.

Check the box below if your pledge qualifies for Caterpillar Builder's
Circle Leadership Giving Society:

→

Stock/Donor-Advised Fund Donation



Submission Successful

Your Stock/Donor Advised Fund pledge was successfully submitted and will be automatically matched by the Caterpillar Foundation.

Next steps: Fulfill your donation directly to your local United Way on the projected transfer date you indicated in your pledge. Contact your local United Way for instructions on how to transfer stock or how to receive a donation from your donor advised fund.

Download your certificate of participation: [View Participation Certificate](#)

Take a quick survey: [United Way survey](#)

Print Pledge Summary

Heart of Illinois United Way
HEART OF ILLINOIS UNITED WAY INC
509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504

Stock/Donor Advised-Fund Donation Information

*Projected Transfer Date: 09/02/2020

* Total Gift Amount: \$50.00

Negative Designation:

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Check the box below if your pledge qualifies for Caterpillar Builder's
Circle Leadership Giving Society:

Return to Home Page

Stock/Donor-Advised Fund Donation

Please select one of the following:



One-Time Credit Card Donation

One-time deduction occurs immediately



Stock/Donor-Advised Fund Donation

Fulfill donation anytime in 2021 or 2022



Check/Cash Donation

Fulfill donation anytime in 2021 or 2022

Close

Check/Cash Donation

If you'd like to switch to a different United Way chapter, click this link.

[Click here to switch to a different United Way Chapter](#)

Cash/Check Gift Information

[Hide Organization Search](#)

Local United Way Search

McLean

United Way of McLean County

[Cancel](#)

[Update](#)

Heart of Illinois United Way

HEART OF ILLINOIS UNITED WAY INC

509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504

*Gift Date

Please enter the date you plan to pay your donation to the nonprofit.

MM/DD/YYYY

*Total Gift Amount

Enter the total gift amount to plan to give to the nonprofit.

Check/Cash Donation

Choose how you'd like to invest your donation.

Below is the United Way and focus areas/programs within the United Way that align to your home zip code. If you want to switch United Way chapters, scroll to the bottom of the page. You may give your full donation to one United Way, Focus Area or United Way partner agency or divide it among several.

To view partner agencies that are eligible for designation, click the drop-down link below to select and "Add" an agency to your displayed donation distribution list below:

Add

Heart of Illinois United Way

\$

211

\$

COVID-19 Relief Fund

\$

Education

\$

Financial Stability

\$

Health

\$

Success By Six

\$

Supporting Student Success (S3)

\$

Total

0

Negative Designation

If you do not want a particular United Way funded partner agency to receive a portion of your gift, please indicate the agency below. Otherwise, leave blank.

If you select you'd like \$10 to deduct your first paycheck in previous step, you would enter \$10 into the allocation chart



To view partner agencies that are eligible for designation, click the drop-down link below to select and "Add" an agency to your displayed donation distribution list below:

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American Red Cross - Central IL Chapter
Big Brothers Big Sisters, Heart of Illinois
Boy Scouts of America W.D. Boyce Council
Boys' & Girls' Clubs of Grtr Peoria Inc
CASA of the 10th Judicial Court
Center For Prevention Of Abuse
Center For Youth And Family Solutions
Central Illinois FRIENDS of PWA
Children's Home Association of Illinois
Common Place
Community Workshop & Training Center
Crittenton Centers
Dream Center
EPIC
EasterSeals Central Illinois
FamilyCore
Freedom House
G.W. Carver Association, Inc.

If an employee designates to an agency from the drop down, there is a **\$25 annual minimum per partner agency (\$1 minimum per United Way or focus area)**

Check/Cash Donation



*United Way and Partner Agency Privacy Preference

*Caterpillar Privacy Preference (?)

Check the box below if your pledge qualifies for Caterpillar Builder's Circle Leadership Giving Society

☐ I donated \$1,000+ or 1%+ of my annual salary.

Save and Proceed

Return to Home Page

Privacy Preferences

*United Way and Partner Agency Privacy Preference

I authorize you to share my name, email, and address with the nonprofit for processing/recognition.
I opt to remain anonymous. When you process my pledge do not send any personal info to United Way.

Privacy Preferences

*United Way and Partner Agency Privacy Preference

*Caterpillar Privacy Preference (?)

I authorize release of my name to the CAT CEUWA planning team for internal incentives/recognition.
I opt to remain anonymous. Do not release my name internally.

Check/Cash Donation



Review Information

You're almost done! Review your donation and click Submit to complete your pledge.

Heart of Illinois United Way
HEART OF ILLINOIS UNITED WAY INC
509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504

Cash/Check Gift Information

*Gift Date: 09/01/2020

Total Gift Amount Local Currency Code: USD - US Dollar

*Total Gift Amount: 50

Negative Designation:

*United Way and Partner Agency Privacy Preference: I authorize you to share my name, email, and address with the nonprofit for processing/recognition.

*Caterpillar Privacy Preference (?) I authorize release of my name to the CAT CEUWA planning team for internal incentives/recognition.



Submit

Make a Change

Return to Home Page

Check/Cash Donation



Submission Successful

Your Check/Cash pledge was successfully submitted and will be automatically matched by the Caterpillar Foundation.

Next steps: Fulfill your donation directly to your local United Way on or around the projected gift date you indicated in your pledge.

Download your certificate of participation: [View Participation Certificate](#)

Take a quick survey: [United Way survey](#)

Print Pledge Summary

Heart of Illinois United Way
HEART OF ILLINOIS UNITED WAY INC
509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504

Cash/Check Gift Information

*Gift Date: 09/01/2020

Total Gift Amount Local Currency Code: USD - US Dollar

*Total Gift Amount: 50

Negative Designation:

*United Way and Partner Agency Privacy Preference: I authorize you to share my name, email, and address with the nonprofit for processing/recognition.

*Caterpillar Privacy Preference (?) I authorize release of my name to the CAT CEUWA planning team for internal incentives/recognition.

Return to Home Page