

## **Campaign Employee Notification Emails**



- Campaign runs from August 16 September 24, 2021 and is open to Caterpillar employees on Canada payroll
- Employees will receive an email August 16, 2021 from your facility communication team with a direct "Click here" link to pledge online
- Employees will have access to the Canada pledge link via <a href="www.caterpillar.com/unitedway">www.caterpillar.com/unitedway</a>



### **Login/Acceptance Terms**



Current Caterpillar/Solar Employees: Use Single Sign On link below.					
Clicl	k here to log in with Single Sign On (CWS ID/Password)				
	s, Caterpillar/Solar Production Employees, Progress Rail Mexico Employees: Use <i>Standard Log In</i> below.				
STANDAF	RD LOG IN:				
	<b>Number:</b> Caterpillar/Solar HR ID (formerly known as D) or Progress Rail ID				
<i>Password fo</i> Initial+Home	r U.S. Retirees: Use password you created when registering. r U.S. Production & Progress Rail Employees: First+Last Zip Code. Initials must be capitalized (ex: JT12345). r Mexico Employees: mexico2021				
	First time user? Create your password				
Employee II	) Number				
Password					
	Show passwo				

### 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 Spate 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.

LACCEPT

I DO NOT ACCEPT

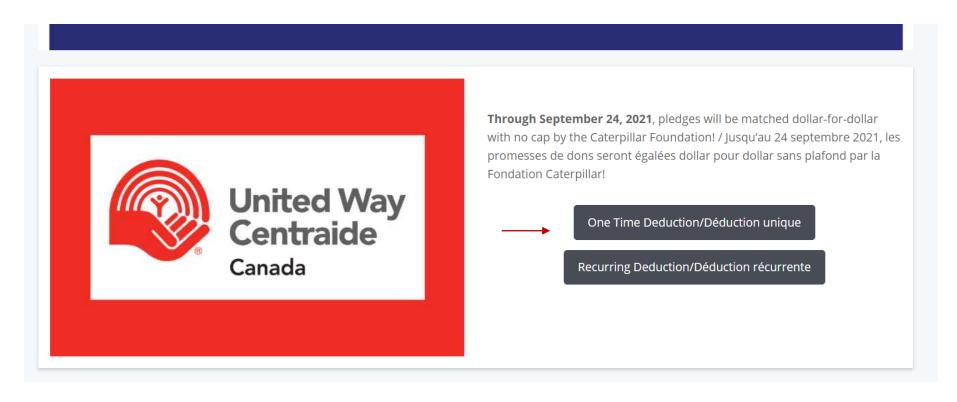


## **Review Pledge Options**



### 2 Options:

- One time payroll deduction
- Recurring payroll deduction





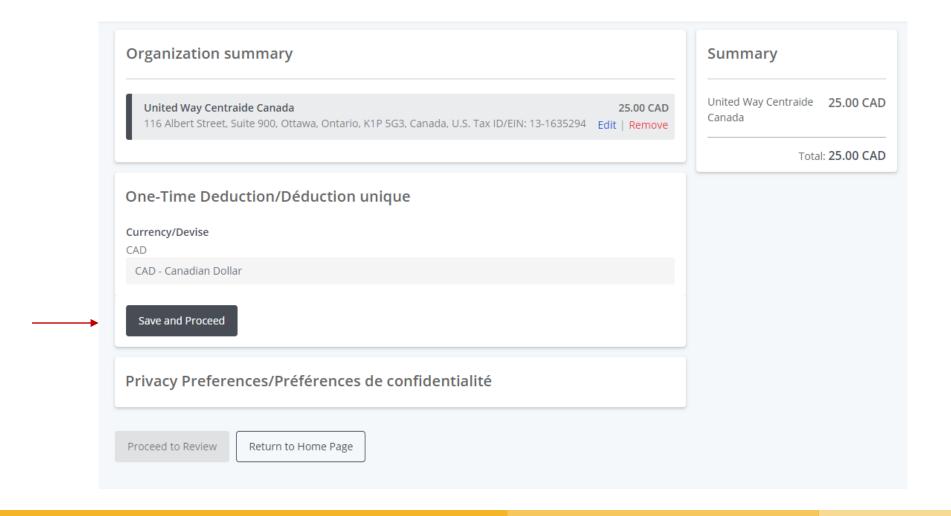
Currency/Devise CAD	
CAD - Canadian Dollar	
Organization Details	
United Way Centraide Canada UNITED WAY WORLDWIDE 116 Albert Street, Suite 900, Ottawa, Ontario, K1P 5G3, Canada, U.S. Tax ID/EIN: 13-1635294	
*Amount you'd like to deduct from your first paycheck in January 2022:/	
Montant à déduire de votre premier chèque de paie en janvier 2022:	
One deduction only. Do not include "\$" symbol. / Une seule déduction. N'incluez pas le symbole "\$".	















United Way Centraide Canada 25.00 CAD 116 Albert Street, Suite 900, Ottawa, Ontario, K1P 5G3, Canada, U.S. Tax ID/EIN: 13-1635294 Edit   Remove	United Way Centraide 25.00 Canada
	Total: <b>25.00</b>
✓ One-Time Deduction/Déduction unique	
Privacy Preferences/Préférences de confidentialité	
*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.	

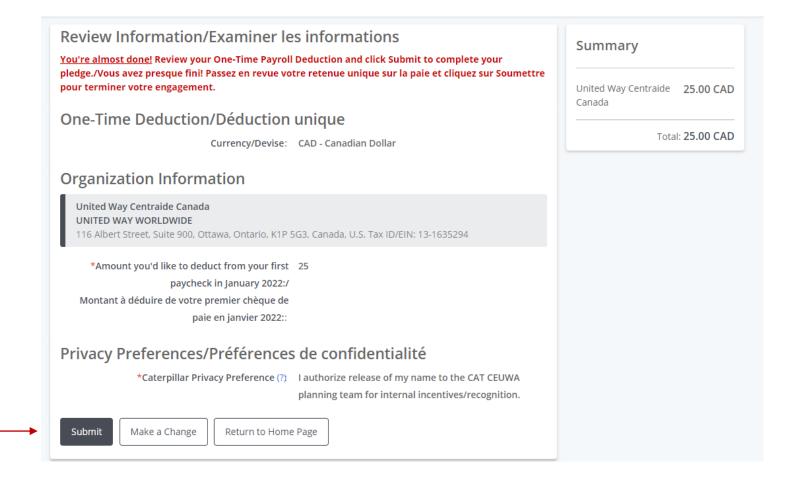




Privacy Prefe	rences/Préférences d	le confidentialité			
*Caterpillar Privacy	Preference (?)				
I authorize release	of my name to the CAT CEUWA	A planning team for internal ir	ncentives/recognition.	•	

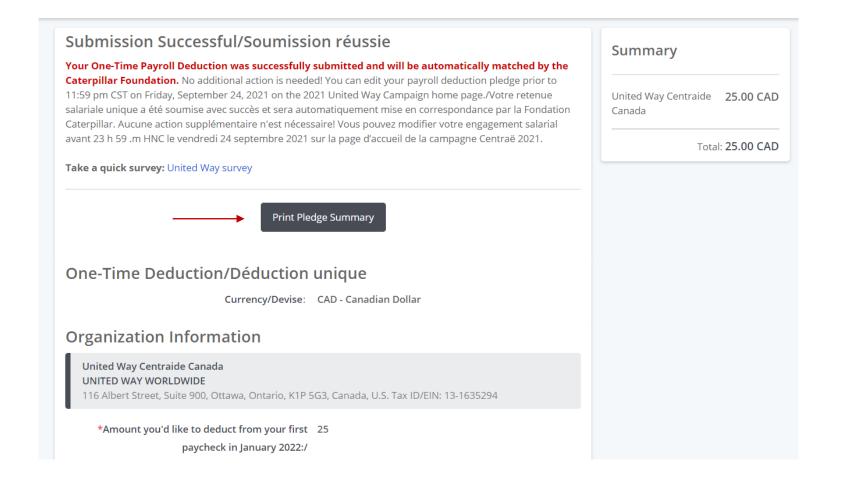
















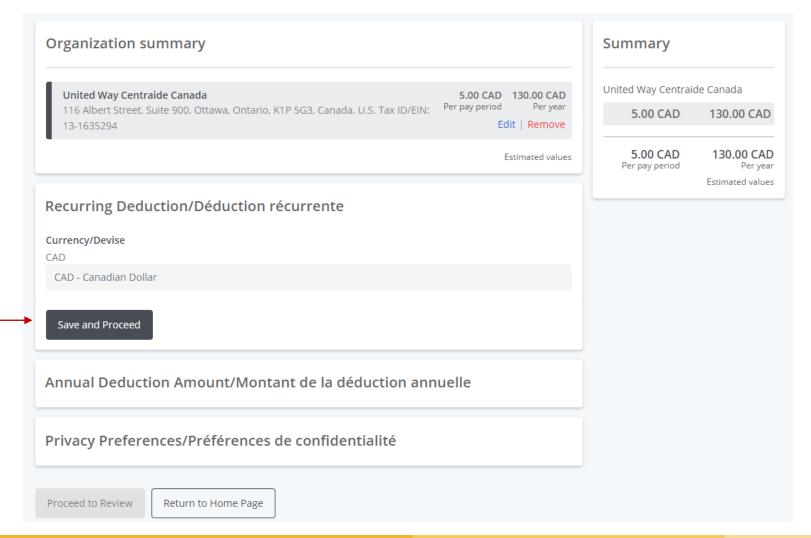
Recurring Deduction/Déduction récurrente	>
Currency/Devise	
CAD - Canadian Dollar	
Organization Details	
United Way Centraide Canada UNITED WAY WORLDWIDE 116 Albert Street, Suite 900, Ottawa, Ontario, K1P 5G3, Canada, U.S. Tax ID/E 1635294	IN: 13-
*Amount to deduct from each paycheck/Montant à déduire de chaque chèqu	e de paie:
This amount will deduct from each paycheck starting in January 2022. Do not inc symbol. /	clude "\$"
Ce montant sera déduit de chaque chèque de paie à partir de janvier 2022. N'ind symbole "\$".	cluez pas le





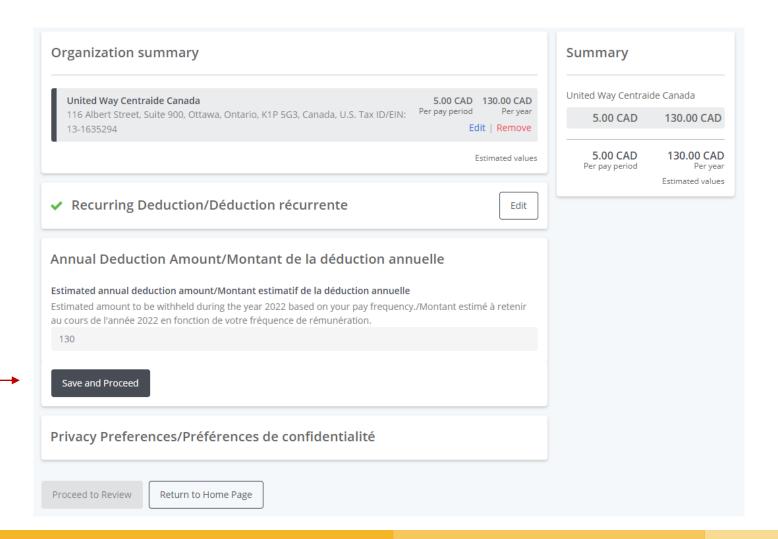






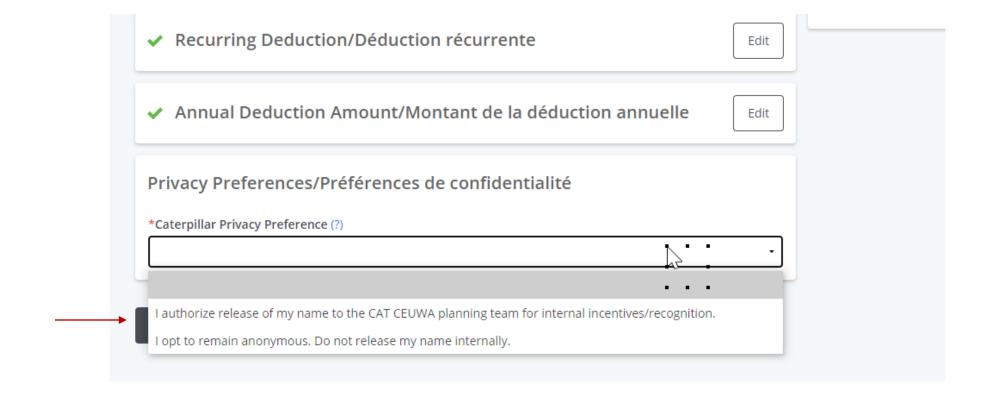






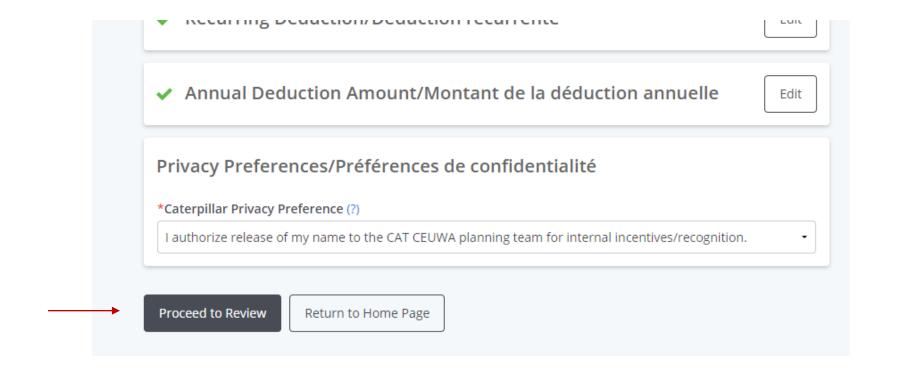






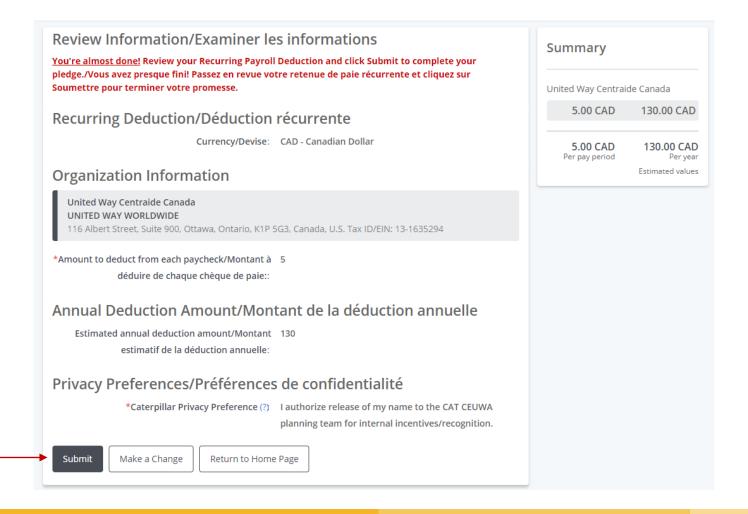






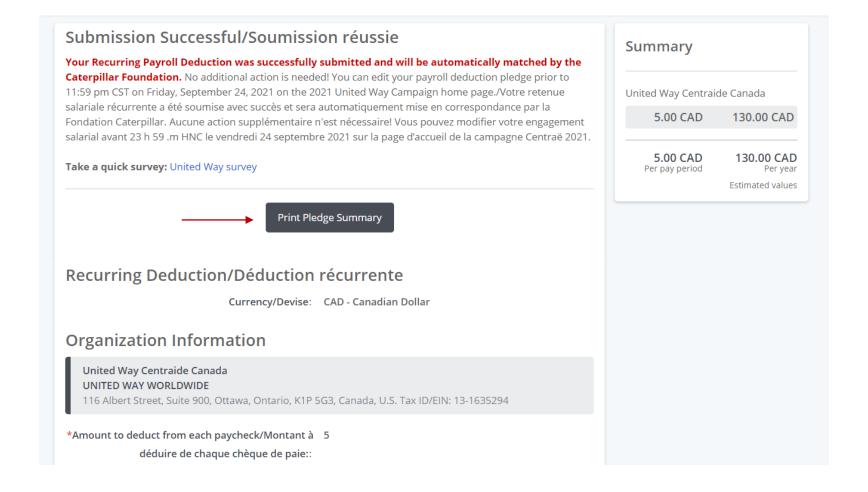














### **Thank You Email**



• Employees with internal email address will also receive a **confirmation email** that contains pledge summary details and a link to the participation certificate.

