

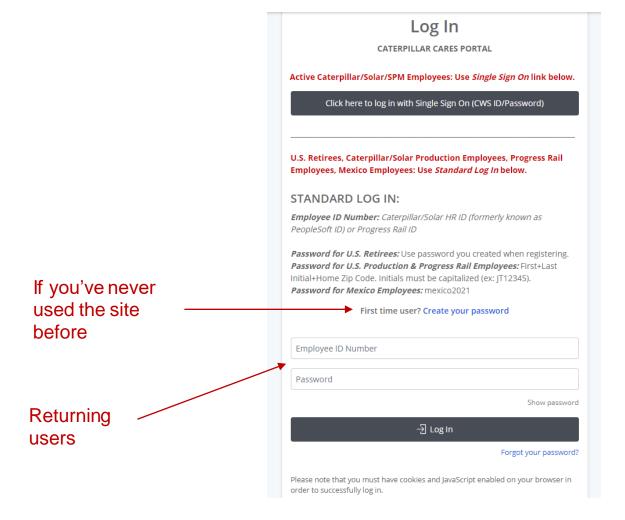
Log In Page



- Visit <u>www.caterpillar.com/unitedway</u> 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 <u>CEUWA Cat@cat.com</u> with questions.



Login/Acceptance Terms





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.

FLIGIBLE GIFTS MUST RE:

- · 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.

2022 U.S., MEXICO, CANADA & PANAMA UNITED WAY CAMPAIGN (AUG. 22 - SEP. 16)

- 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 cookles 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.

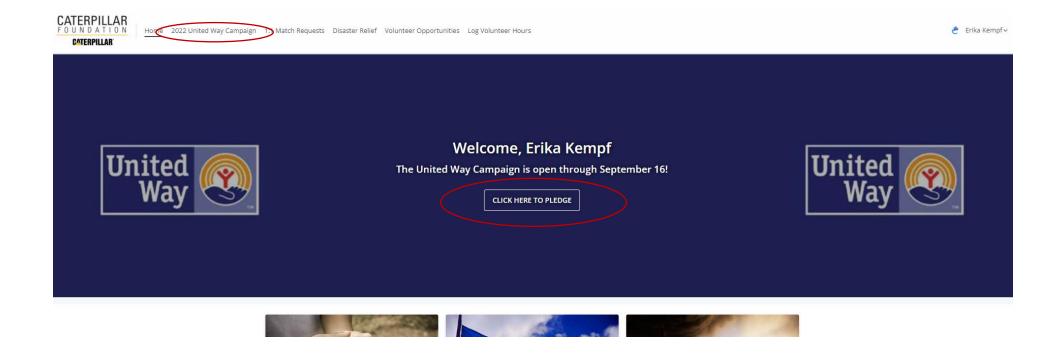
I ACCEPT

I DO NOT ACCEPT



Select "Click Here to Pledge" or "2022 United Way Campaign" Tab







Review Pledge Options





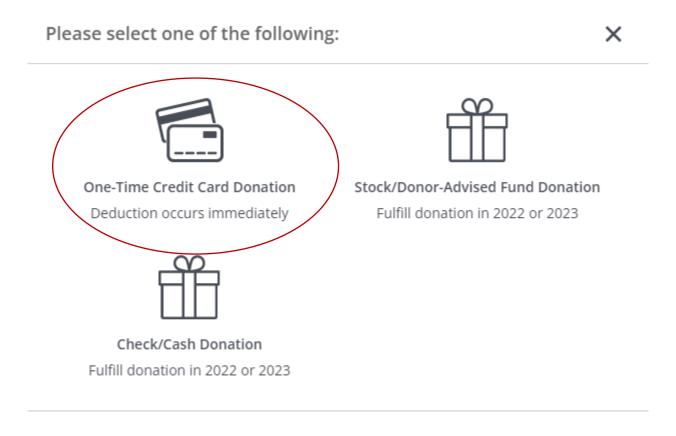


Retirees have three payment options:

- . One-Time Credit/Debit Card
- 2. Stock/Donor-Advised Fund
- 3. Check/cash







Close





Hide Organization Search

Local United Way Search

United Way of McLean County

McLean

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

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/Debit Card	
*Donation Amount Enter the amount you'd like to deduct from your credit/debit card today. Do not enter the "\$" symbol or a comma.	Enter Donation Amount





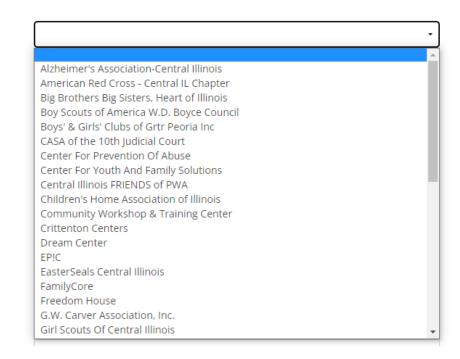
Using the designation table below, choose where you'd like your donation to go. Enter the amount you'd like directed to a United Way's General Fund, Focus Area(s) or United Way partner agencies.

- \$1 minimum to United Way General Fund or Focus Area
- \$25 annual minimum per Partner Agency

Optional: Click the drop-down arrow below to select and "Add" partner agencies to your

designation table.	
•	
Add	
Heart of Illinois United Way General Fund	
s	
211	
s	
COVID-19 Relief Fund	
s	
Education	
s	
Financial Stability	
\$	
Health	
\$	
Success By Six	
s	
Supporting Student Success (S3)	
\$	
Total	
0	

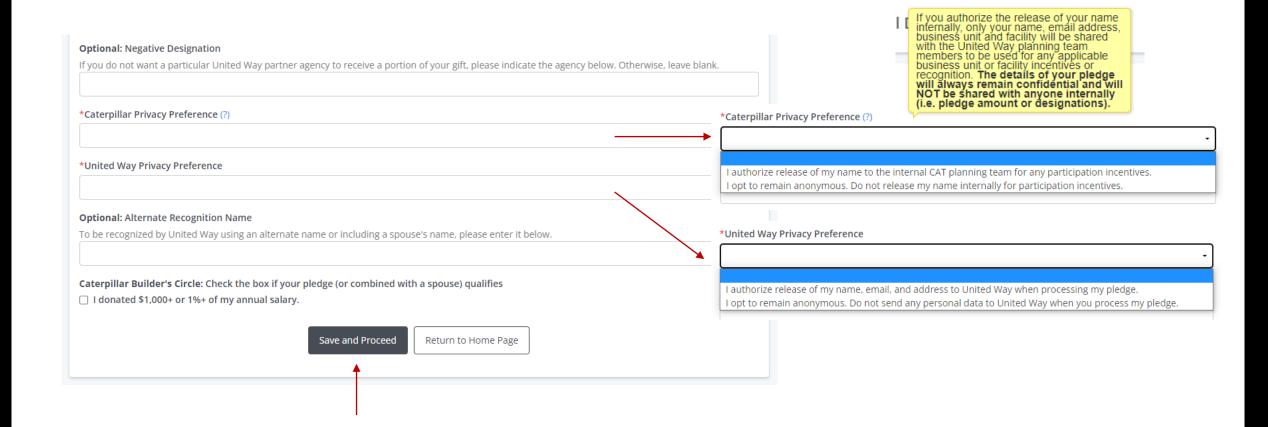
If you select you'd like \$10 to deduct from your credit/debit card, you would enter \$10 into the designation table. **Your donation amount must match the designation table total.**



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)









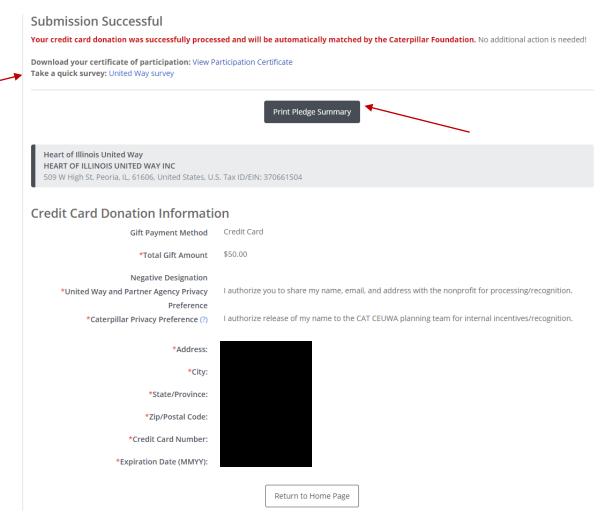


Review Information You're almost done! Provide your credit/debit card information and click "Submit" to complete your pledge. The transaction will process immediately and you will be unable to edit your pledge. Heart of Illinois United Way HEART OF ILLINOIS UNITED WAY INC 509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504 Credit Card Donation Information Gift Payment Method Credit/Debit Card *Donation Amount \$50.00 **Optional:** Negative Designation *Caterpillar Privacy Preference (?) I authorize release of my name to the internal CAT planning team for any participation incentives. *United Way Privacy Preference I authorize release of my name, email, and address to United Way when processing my pledge. Optional: Alternate Recognition Name Caterpillar Builder's Circle: Check the box if your pledge (or combined with a spouse) qualifies

Address:
City:
Frank (Principles)
State/Province:
Zip/Postal Code:
·
redit Cards Accepted:
MEX POST VISA
Credit Card Number:
no spaces or dashes)
Expiration Date (MM/YY):
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 have chosen to donate
\$50.00
You will be charged immediately. This charge will appear on your statement as CAT FOUNDATION.
Submit Make a Change Return to Home Page









Please select one of the following:





One-Time Credit Card Donation

Deduction occurs immediately



Stock/Donor-Advised Fund Donation

Fulfill donation in 2022 or 2023



Check/Cash Donation

Fulfill donation in 2022 or 2023

Close





If you'd like to switch to a different	Hide Organization Search
United Way chapter, click this link.	Local United Way Search
	McLean
	United Way of McLean County
Click here to switch to a different United Way Chapter	
Stock/Donor Advised-Fund Donation Information	Cancel
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 Unite	d Way.
MM/DD/YYYY	
*Donation Amount	
The amount you plan to transfer to United Way on the date above. Do not enter the "\$" symbol or a	a comma.





Using the designation table below, choose where you'd like your donation to go. Enter the amount you'd like directed to a United Way's General Fund, Focus Area(s) or United Way - \$1 minimum to United Way General Fund or Focus Area \$25 annual minimum per Partner Agency Optional: Click the drop-down arrow below to select and "Add" partner agencies to your Heart of Illinois United Way General Fund 211 COVID-19 Relief Fund Education Financial Stability Health \$ Success By Six Supporting Student Success (S3) Total

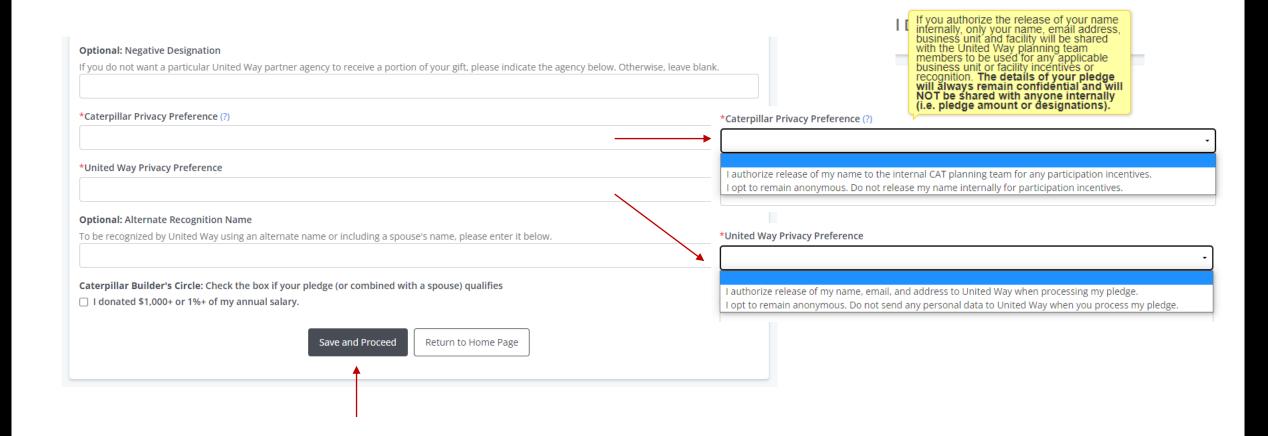
Alzheimer's Association-Central Illinois American Red Cross - Central IL Chapter Big Brothers Big Sisters, Heart of Illinois Boy Scouts of America W.D. Boyce Council Boys' & Girls' Clubs of Grtr Peoria Inc CASA of the 10th Judicial Court Center For Prevention Of Abuse Center For Youth And Family Solutions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

If you select you'd like \$10 to transfer from your stock/donor-advised fund, you would enter \$10 into the designation table. **Your donation amount must match the designation table total.**

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)

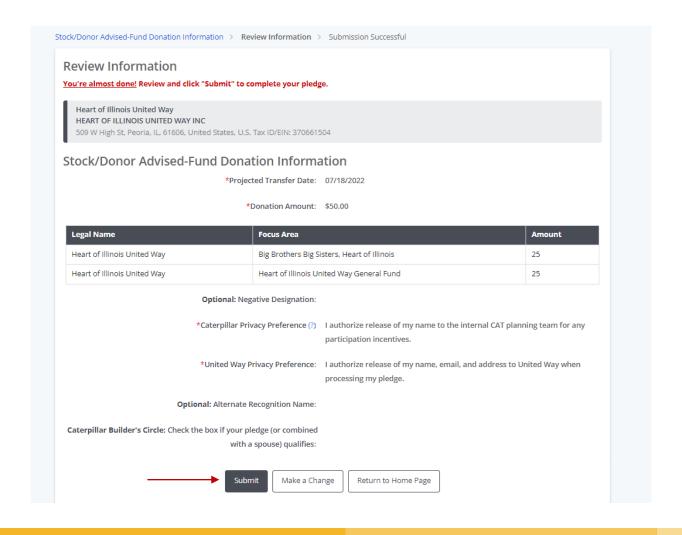






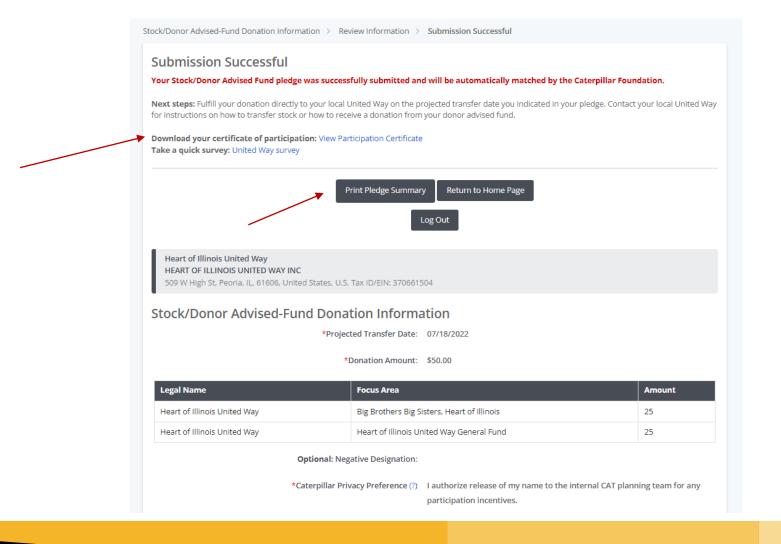
















Please select one of the following:





One-Time Credit Card Donation

Deduction occurs immediately



Stock/Donor-Advised Fund Donation

Fulfill donation in 2022 or 2023



Close





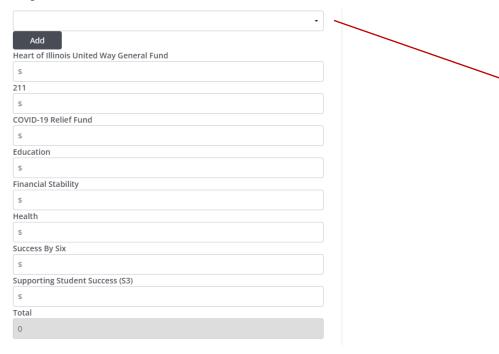
cancel C Update
Cancel $\mathcal C$ Update



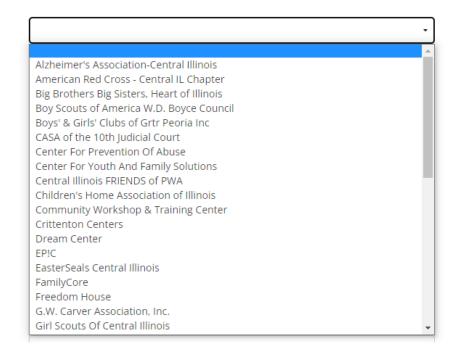
Using the designation table below, choose where you'd like your donation to go. Enter the amount you'd like directed to a United Way's General Fund, Focus Area(s) or United Way partner agencies.

- \$1 minimum to United Way General Fund or Focus Area
- \$25 annual minimum per Partner Agency

Optional: Click the drop-down arrow below to select and "Add" partner agencies to your designation table:



Ex: If you select to contribute \$50, you would enter \$50 into the designation table. Your donation amount must match the designation table total.



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)





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•	name, email, and address to United Way when processing my pledge.	
Topt to remain anonymo	us. Do not send any personal data to United Way when you process my pledge.	
Caterpillar Builder's Circ	le: Check the box if your pledge (or combined with a spouse) gualifies	
•	le: Check the box if your pledge (or combined with a spouse) qualifies	
•	le: Check the box if your pledge (or combined with a spouse) qualifies %+ of my annual salary.	
•		
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Decide if you'd like your information sent to United Way when processing your pledge or if you'd like to remain anonymous. Also select if you qualify for Caterpillar Builder's Circle





