

Caterpillar Employee United Way Appeal

2022 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

Active Caterpillar/Solar/SPM 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.

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 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

Select “Click Here to Pledge” or “2022 United Way Campaign” Tab



Welcome, Erika Kempf
The United Way Campaign is open through September 16!

[CLICK HERE TO PLEDGE](#)



Review Pledge Options



Retirees have three payment options:

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

One-Time Credit Card Donation

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

One-Time Credit Card Donation



[Hide Organization Search](#)

Local United Way Search

McLean

United Way of McLean County

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

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

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

One-Time Credit Card Donation



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:

<div><div></div><div></div></div>
<div>Add</div>
Heart of Illinois United Way General Fund
<div>\$</div>
211
<div>\$</div>
COVID-19 Relief Fund
<div>\$</div>
Education
<div>\$</div>
Financial Stability
<div>\$</div>
Health
<div>\$</div>
Success By Six
<div>\$</div>
Supporting Student Success (S3)
<div>\$</div>
Total
<div>0</div>

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
EPIC
EasterSeals Central Illinois
FamilyCore
Freedom House
G.W. Carver Association, Inc.
Girl Scouts Of Central Illinois

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)**

One-Time Credit Card Donation



Optional: Negative Designation

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

*Caterpillar Privacy Preference (?)

*United Way Privacy Preference

Optional: Alternate Recognition Name

To be recognized by United Way using an alternate name or including a spouse's name, please enter it below.

Caterpillar Builder's Circle: Check the box if your pledge (or combined with a spouse) qualifies

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

Save and Proceed

Return to Home Page

If you authorize the release of your name internally, only your name, email address, business unit and facility will be shared with the United Way planning team members to be used for any applicable business unit or facility incentives or recognition. **The details of your pledge will always remain confidential and will NOT be shared with anyone internally (i.e. pledge amount or designations).**

*Caterpillar Privacy Preference (?)

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

*United Way Privacy Preference

I authorize release of my name, email, and address to United Way when processing my pledge.
I opt to remain anonymous. Do not send any personal data to United Way when you process my pledge.

One-Time Credit Card Donation



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:

*State/Province:

*Zip/Postal Code:

Credit Cards Accepted:



*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

One-Time 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:

*City:

*State/Province:

*Zip/Postal Code:

*Credit Card Number:

*Expiration Date (MMYY):

Return to Home Page

Stock/Donor-Advised Fund Donation

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

Stock/Donor-Advised Fund 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](#)

Stock/Donor Advised-Fund Donation 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

*Projected Transfer Date

The date you plan to transfer the stock or initiate the transfer from your donor-advised fund to United 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 comma.**

Stock/Donor-Advised Fund Donation



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:

<div><div></div><div></div></div>
<div>Add</div>
Heart of Illinois United Way General Fund
<div>\$</div>
211
<div>\$</div>
COVID-19 Relief Fund
<div>\$</div>
Education
<div>\$</div>
Financial Stability
<div>\$</div>
Health
<div>\$</div>
Success By Six
<div>\$</div>
Supporting Student Success (S3)
<div>\$</div>
Total
<div>0</div>

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
EPIC
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)**

Stock/Donor-Advised Fund Donation



Optional: Negative Designation

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

*Caterpillar Privacy Preference (?)

*United Way Privacy Preference

Optional: Alternate Recognition Name

To be recognized by United Way using an alternate name or including a spouse's name, please enter it below.

Caterpillar Builder's Circle: Check the box if your pledge (or combined with a spouse) qualifies

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

Save and Proceed

Return to Home Page

If you authorize the release of your name internally, only your name, email address, business unit and facility will be shared with the United Way planning team members to be used for any applicable business unit or facility incentives or recognition. **The details of your pledge will always remain confidential and will NOT be shared with anyone internally (i.e. pledge amount or designations).**

*Caterpillar Privacy Preference (?)

I authorize release of my name to the internal CAT planning team for any participation incentives.

I opt to remain anonymous. Do not release my name internally for participation incentives.

*United Way Privacy Preference

I authorize release of my name, email, and address to United Way when processing my pledge.

I opt to remain anonymous. Do not send any personal data to United Way when you process my pledge.

Stock/Donor-Advised Fund Donation

[Stock/Donor Advised-Fund Donation Information](#) > [Review Information](#) > Submission Successful

Review Information

You're almost done! Review 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: 07/18/2022

*Donation Amount: \$50.00

Legal Name	Focus Area	Amount
Heart of Illinois United Way	Big Brothers Big Sisters, Heart of Illinois	25
Heart of Illinois United Way	Heart of Illinois United Way General Fund	25

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:

→

Stock/Donor-Advised Fund Donation

Stock/Donor Advised-Fund Donation Information > Review Information > Submission Successful

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](#)

[Return to Home Page](#)

[Log Out](#)

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: 07/18/2022

*Donation Amount: \$50.00

Legal Name	Focus Area	Amount
Heart of Illinois United Way	Big Brothers Big Sisters, Heart of Illinois	25
Heart of Illinois United Way	Heart of Illinois United Way General Fund	25

Optional: Negative Designation:

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

Check/Cash Donation

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

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

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. **Do not enter the "\$" symbol or a comma.**

[Hide Organization Search](#)

Local United Way Search

McLean

United Way of McLean County

[Cancel](#)

[Update](#)

Check/Cash Donation

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:

<input type="text"/>
<input type="button" value="Add"/>
Heart of Illinois United Way General Fund
<input type="text" value="\$"/>
211
<input type="text" value="\$"/>
COVID-19 Relief Fund
<input type="text" value="\$"/>
Education
<input type="text" value="\$"/>
Financial Stability
<input type="text" value="\$"/>
Health
<input type="text" value="\$"/>
Success By Six
<input type="text" value="\$"/>
Supporting Student Success (S3)
<input type="text" value="\$"/>
Total
<input type="text" value="0"/>

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

EPIC

EasterSeals Central Illinois

FamilyCore

Freedom House

G.W. Carver Association, Inc.


Girl Scouts Of Central Illinois

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)**

Check/Cash Donation


*United Way Privacy Preference



I authorize release of my name, email, and address to United Way when processing my pledge.
I opt to remain anonymous. Do not send any personal data to United Way when you process my pledge.

Caterpillar Builder's Circle: Check the box if your pledge (or combined with a spouse) qualifies

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

 Save and Proceed

Return to Home Page

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

Check/Cash Donation

Review Information

You're almost done! Review 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: 08/22/2022

Total Gift Amount Local Currency Code: USD - US Dollar

*Total Gift Amount: 50

Legal Name	Focus Area	Amount
Heart of Illinois United Way	Heart of Illinois United Way General Fund	50

Optional: Negative Designation:

*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:



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

Return to Home Page

Log Out

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: 08/22/2022

Total Gift Amount Local Currency Code: USD - US Dollar

*Total Gift Amount: 50

Legal Name	Focus Area	Amount
Heart of Illinois United Way	Heart of Illinois United Way General Fund	50

Optional: Negative Designation:

*United Way Privacy Preference: I authorize release of my name, email, and address to United Way when processing my pledge.