Caterpillar Employee United Way Appeal

2023 Panama Step by Step Pledging Guide



Campaign Employee Notification Emails



- Campaign runs from August 21 September 15, 2023 and is open to Caterpillar employees on Mexico payroll
- Employees will receive an email August 21, 2023 from your facility communication team with a direct "Click here" link to pledge online
- Employees will have access to the Panama pledge link via www.caterpillar.com/unitedway



Login/Acceptance Terms

CATERPILLAR EMPLOYEE UNITED WAY APPEAL LIVE UNITED United Way Way

You can use the Single Sign On link at the top



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

Employee ID Number		
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 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.

1:1 MATCHING GIFTS PROGRAM

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:

- · Made to an eligible charity or school per the program guidelines (please also reference the ineligible charities section).
- 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, PayPal, IRA QCD/RMD or marketable securities. Gifts may also be made from an entity such as a personal foundation
 and a securities and find light a set of fi
- 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.

VOLUNTEER SERVICE MATCH (ACTIVE EMPLOYEES ONLY)

For every 10 hours an eligible Caterpillar participant volunteers to an eligible charity and records, the participant may request the Foundation to provide a \$100 USD grant to an eligible charity designated by the participant. A maximum of \$1,000 USD (up to 100 hours) per calendar year may be granted per participant. ELIGIBLE VOLUNTEER HOURS MUST BE:

- Volunteered at an eligible charity or school per the program guidelines (please also reference the ineligible charities section).
- Contributed time, effort and/or talent (without financial gain) to help an eligible charity or school further their mission.
- Performed during employee personal time or, at the discretion of Human Resources and management within your division, during working hours. This may
 include volunteer hours that count toward any applicable volunteer time-off policy in your country.
- Employees must record hours and submit volunteer service match requests online by January 31 of the year following the donation in order to be eligible for the Foundation match.

U.S., MEXICO, PANAMA & CANADA UNITED WAY CAMPAIGN (CAMPAIGN CURRENTLY CLOSED. WILL RE-OPEN AUG 21 - SEP 15, 2023)

- 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 program updates, announcements 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 and volunteer service match, the Caterpillar Foundation does not provide nonprofits with the participant's full mailing address but will provide the participant's name, gift details provided, home city/state (not full address) and email address (in some instances) to the nonprofit for match request verification purposes only. For United Way piedge processing, your personal information (name, home address, email address and piedge details) may be provided to your local United Way uchapter 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)

Please note that all organizations and requests 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.

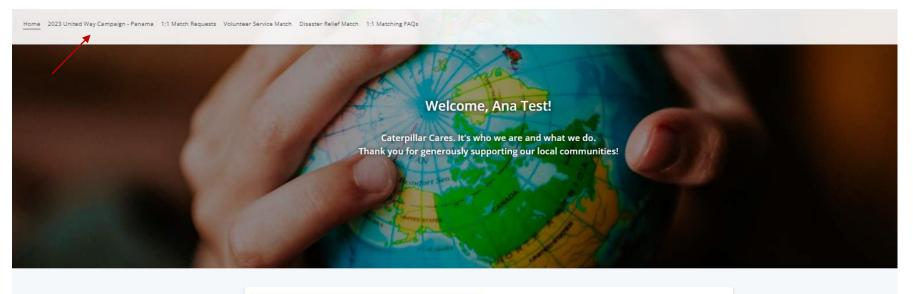
By clicking I accept below, I agree to the terms of these program guidelines and acknowledge that the information I provide is truthful and accurate.





Review Pledge Options







Through September 15, pledge to Fondo Unido de Panamá and have your donation matched by the Caterpillar Foundation!

PLEDGE NOW



Review Pledge Options



Select One-Time Payroll Deduction or Recurring Payroll Deduction



AUGUST 21 - SEPTEMBER 15, 2023





CATERPILLAR EMPLOYEE UNITED WAY APPEAL LIVE UNITED United Way Way

One-Time Deduction Information

Currency

USD

USD - US Dollar

Organization Details

Fondo Unido de Panamá UNITED WAY WORLDWIDE United Way Panama Business Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, N/A, N/A, 00000, Panama, U.S. Tax ID/EIN: 13-1635294, AR@unitedway.org, http://www.fondounidodepanama.org

Amount you'd like to deduct from your first paycheck in January 2024

Do not include "\$" symbol.

Cancel

O Update





Organization summary	Summary
Fondo Unido de Panamá 25.00 USD Business Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, 00000, Panama, U.S. TaxEdit Remove	Fondo Unido de 25.00 USD Panamá
ID/EIN: 13-1635294	Total: 25.00 USD
One-Time Deduction Information	
Currency USD	
USD - US Dollar	
Save and Proceed	
Privacy Preferences	
Proceed to Review Return to Home Page	





Organization summary	Summary
Fondo Unido de Panamá25.00 USDBusiness Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, 00000, Panama, U.S. Tax Edit RemoveID/EIN: 13-1635294	Fondo Unido de 25.00 U Panamá Total: 25.00 U
✓ One-Time Deduction Information Edit Edit	
Privacy Preferences *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. Proceed to Review Return to Home Page	





Review Information <u>You're almost done!</u> Review your One-Time Payroll Deduction and click Submit to complete your pledge.	Summary
One-Time Deduction Information Currency: USD - US Dollar	Fondo Unido de 25.00 USD Panamá Total: 25.00 USD
Organization Information	Total: 23.00 03D
Fondo Unido de Panamá UNITED WAY WORLDWIDE United Way Panama Business Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, N/A, N/A, 00000, Panama, U.S. Tax ID/EIN: 13-1635294, AR@unitedway.org, http://www.fondounidodepanama.org	
Amount you'd like to deduct from your first 25 paycheck in January 2024:	
Privacy Preferences	
*Caterpillar Privacy Preference (?) I authorize release of my name to the internal Cat planning team for any participation incentives.	
Return to Home Page Make a Change Submit	





Submission Successful	Summary	
 Your One-Time Payroll Deduction was successfully submitted and will be automatically matched by the Caterpillar Foundation. No additional action is needed! You can edit your payroll deduction pledge prior to 11:59 pm EST on Friday, September 15, 2023. Download your certificate of participation: View Participation Certificate Fake a quick survey: United Way survey 	Fondo Unido de 25. Panamá Total: 25.	.00 USE
Print Pledge Summary	Total: 25.	00 032
One-Time Deduction Information		
Organization Information		
Fondo Unido de Panamá UNITED WAY WORLDWIDE United Way Panama Business Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, N/A, N/A, 00000, Panama, U.S. Tax ID/EIN: 13-1635294, AR@unitedway.org, http://www.fondounidodepanama.org		
Amount you'd like to deduct from your first 25 paycheck in January 2024:		
Privacy Preferences		
*Caterpillar Privacy Preference (?) I authorize release of my name to the internal Cat planning team for any participation incentives.		
Return to Home Page		



LIVE UNITED WAY APPEAL Way Way

Recurring Deduction Information

Currency

USD

USD - US Dollar

Organization Details

Fondo Unido de Panamá UNITED WAY WORLDWIDE United Way Panama Business Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, N/A, N/A, 00000, Panama, U.S. Tax ID/EIN: 13-1635294, AR@unitedway.org, http://www.fondounidodepanama.org

*Amount to deduct from each paycheck starting in January 2024

Do not include "\$" symbol.

Cancel 💮 Update

-





Organization summary		Summary	
Fondo Unido de Panamá	2.00 USD 24.00 USD	Fondo Unido de Panamá	
Business Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, 00000, Panama, U.S. Tax ID/EIN: 13-1635294	Per pay period Per year Edit Remove	2.00 USD	24.00 USD
	Estimated values	2.00 USD Per pay period	24.00 USI Per yea Estimated value
Recurring Deduction Information			
Currency JSD			
USD - US Dollar			
Save and Proceed			
Annual Deduction Amount			
Privacy Preferences			
Proceed to Review Return to Home Page			





Organization Summary		Summary
Fondo Unido de Panamá	2.00 USD 24.00 USD	Fondo Unido de Panamá
Business Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, N/A, N/A, 00000, Panama, U.S. Tax ID/EIN: 13-1635294,	Per pay period Per year Edit Remove	2.00 USD 24.00 USD
http://www.fondounidodepanama.org	Estimated values	2.00 USD Per pay period 24.00 USD Per year Estimated values
 Recurring Deduction Information 	Edit	
Annual Deduction Amount		
Estimated amount to deduct in the year 2024		
24		
Save and Proceed		
Privacy Preferences		
Return to Home Page Proceed to Review		





Organization summary		Summary	
Fondo Unido de Panamá	2.00 USD 24.00 USD	Fondo Unido de Pa	namá
Business Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, 00000, Panama, U.S. Tax ID/EIN: 13-1635294	Per pay period Per year Edit Remove	2.00 USD	24.00 US
	Estimated values	2.00 USD Per pay period	24.00 U Per y Estimated valu
 Recurring Deduction Information 	Edit		
 Annual Deduction Amount 	Edit		
Privacy Preferences			
*Caterpillar Privacy Preference (?)			
I authorize release of my name to the internal CAT planning team for any partici I opt to remain anonymous. Do not release my name internally for participation Proceed to Review Return to Home Page			





Review Information You're almost done! Review your Recurring Payroll Deduction and click Submit to complete your pledge.	Summary	
Recurring Deduction Information	Fondo Unido de Pa	namá
Currency: USD - US Dollar	2.00 USD	24.00 USD
Organization Information	2.00 USD Per pay period	24.00 USD Per year
Fondo Unido de Panamá UNITED WAY WORI DWIDE		Estimated values
United Way Panama		
Business Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, N/A, N/A, 00000, Panama, U.S. Tax ID/EIN: 13-1635294, AR@unitedway.org, http://www.fondounidodepanama.org		
*Amount to deduct from each paycheck starting in 2		
January 2024:		
Annual Deduction Amount		
Estimated amount to deduct in the year 2024: 24		
Privacy Preferences		
*Caterpillar Privacy Preference (?) I authorize release of my name to the internal Cat		
planning team for any participation incentives.		
Return to Home Page Make a Change Submit		



CATERPILLAR EMPLOYEE UNITED WAY APPEAL LIVE UNITED United Way Way

Submission Successful	Summary	
Your Recurring Payroll Deduction was successfully submitted and will be aut Caterpillar Foundation. No additional action is needed! You can edit your payrol 11:59 pm EST on Friday, September 15, 2023.		namá
Download your certificate of participation: View Participation Certificate Take a quick survey: United Way survey	2.00 USD	24.00 USE
Print Pledge Summary	2.00 USD Per pay period	24.00 US Per yea Estimated value
Recurring Deduction Information		
Currency: USD - US Dollar		
Organization Information		
Fondo Unido de Panamá UNITED WAY WORLDWIDE United Way Panama Business Park, Torre Sur, Piso #1, Costa del Este, Ciudad de Panamá, N/A, N/A, ID/EIN: 13-1635294, AR@unitedway.org, http://www.fondounidodepanama.org		
*Amount to deduct from each paycheck starting in 2 January 2024:		
Annual Deduction Amount		
Estimated amount to deduct in the year 2024: 24		
Privacy Preferences		
*Caterpillar Privacy Preference (?) I authorize release of my planning team for any pa		
planning team for any pa	rticipation incentives.	



Participation Certificate

LIVE UNITED WAY APPEAL Way

- All employees who take action will have access to print the generic "thank you" certificate on final page of pledging.
- Employees with internal email address will also receive a **confirmation email** that contains pledge summary details and a link to the participation certificate.

Download your certificate of participation: View Participation Certificate Take a quick survey: United Way survey

CATERPILLAR EMPLOYEE UNITE	
PARTICIPATION CER	TIFICATE
Employee Name (print) Employee ID #	
Thank you for changing lives! Caterpillar and United Way share a common goal – to improve lives, invest in our community and create a better tomorrow. Thank you for participating in the Caterpillar Employee United Way Appeal	CATERPILLAR FOUNDATION CATERPILLAR

Print Pledge Summary



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.

