



Caterpillar Employee United Way Appeal

2023 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

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: mexico2023

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.

If you've never used the site before

Returning users

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 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 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](#)

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.

[I ACCEPT](#) [I DO NOT ACCEPT](#)

Select “Click Here to Pledge” or “2023 United Way Campaign” Tab



1:1 Matching Gifts

- Submit a match request or search for eligible charities and schools



Bradley University Match

- Submit a Bradley University match request
- Exempt from \$10,000 USD cap



Red Cross US Disaster Match

- Open Designations: Typhoon Mawar, Southern & Midwest Tornadoes and Storms

Review Pledge Options



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

Pledge today and have your donation matched dollar-for-dollar by the Caterpillar Foundation!

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 2023 or 2024



Check/Cash Donation
Fulfill donation in 2023 or 2024

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:

<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

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 2023 or 2024



Check/Cash Donation
Fulfill donation in 2023 or 2024

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](#)

[Hide Organization Search](#)

Local United Way Search

McLean

United Way of McLean County

[Cancel](#) [Update](#)

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 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:

<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

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 2023 or 2024



Check/Cash Donation
Fulfill donation in 2023 or 2024

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:



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.