

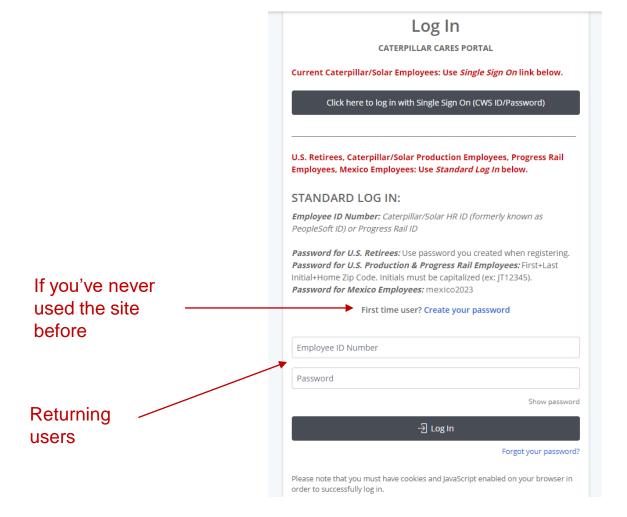
# Log In Page



- 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 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 CIETS DROCDAM

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 yiengere 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

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







# **Review Pledge Options**







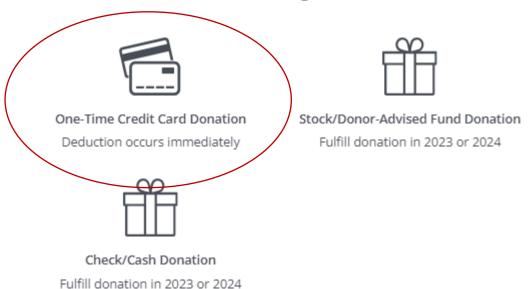
Retirees have three payment options:

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





#### Please select one of the following:



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 - \$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

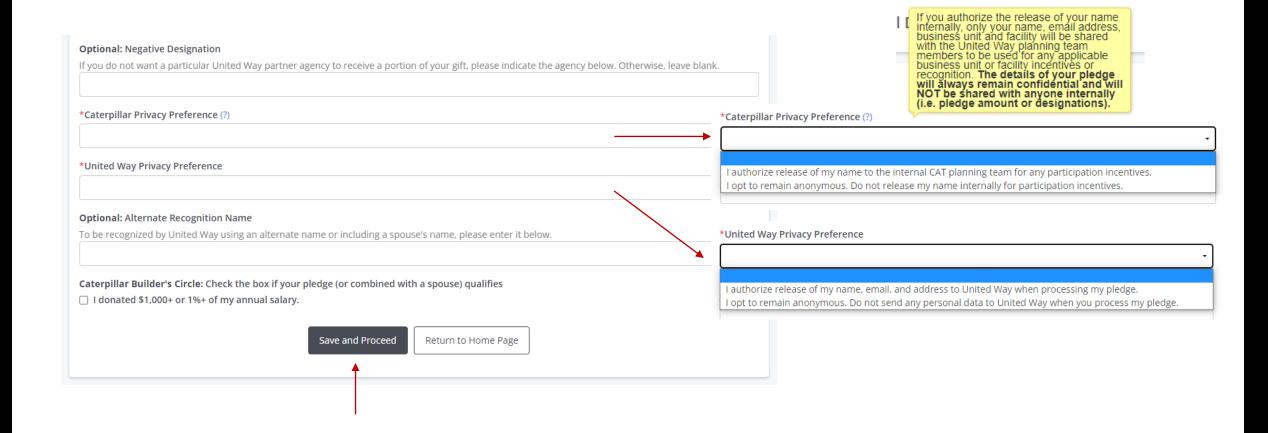
Alzheimer's Association-Central Illinois American Red Cross - Central IL Chapter Big Brothers Big Sisters, Heart of Illinois Boy Scouts of America W.D. Boyce Council Boys' & Girls' Clubs of Grtr Peoria Inc CASA of the 10th Judicial Court Center For Prevention Of Abuse Center For Youth And Family Solutions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









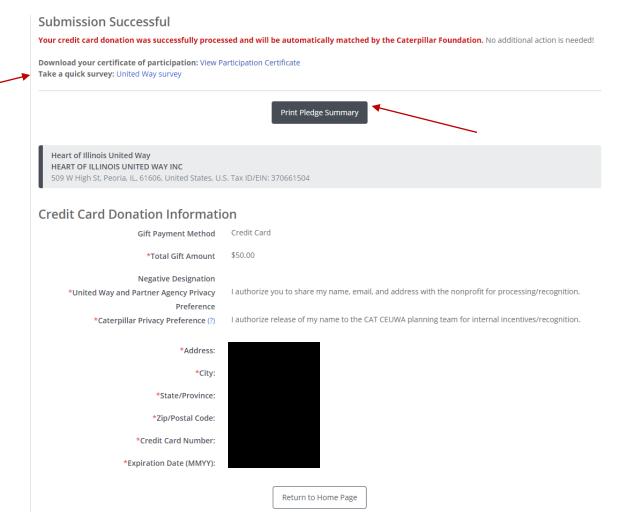


#### **Review Information** You're almost done! Provide your credit/debit card information and click "Submit" to complete your pledge. The transaction will process immediately and you will be unable to edit your pledge. Heart of Illinois United Way HEART OF ILLINOIS UNITED WAY INC 509 W High St, Peoria, 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

| ddress:  |  |
|--|--|
| ity:   |  |
| uy.  |  |
| itate/Province:  |  |
|  |  |
| lip/Postal Code:   |  |
| edit Cards Accepted:   |  |
| MEX POST VISA  |  |
| redit Card Number:   |  |
| o spaces or dashes)  |  |
| expiration Date (MM/YY):   |  |
| TVV isa, 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



Check/Cash Donation

Fulfill donation in 2023 or 2024



Close



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

| Hide Organization Search    | ı |
|-----------------------------|---|
| Local United Way Search     | 1 |
| McLean                      | 1 |
| United Way of McLean County | ı |
|                             | 7 |

Click here to switch to a different United Way Chapter

#### Stock/Donor Advised-Fund Donation Information

509 W High St, Peoria, IL, 61606, United States, U.S. Tax ID/EIN: 370661504

#### \*Projected Transfer Date

Heart of Illinois United Way

HEART OF ILLINOIS UNITED WAY INC

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

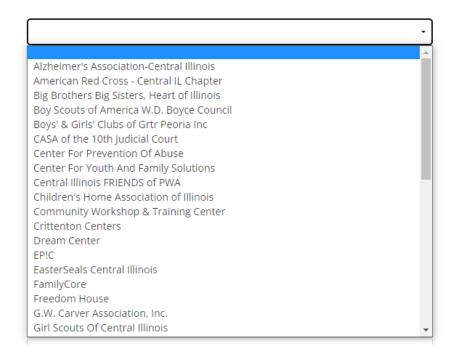
The amount you plan to transfer to United Way on the date above. Do not enter the "\$" symbol or a comma.





| amount you'd like directed to a United Way's General Fund, Focus Area(s) or United | d 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  |       |
| \$   |       |
| 211  |       |
| \$   |       |
| COVID-19 Relief Fund   |       |
| \$   |       |
| Education  |       |
| \$   |       |
| Financial Stability  |       |
| \$   |       |
| Health   |       |
| \$   |       |
| Success By Six   |       |
| \$   |       |
| Supporting Student Success (S3)  |       |
| \$   |       |
| Total  |       |
| 0  |       |
|  |       |

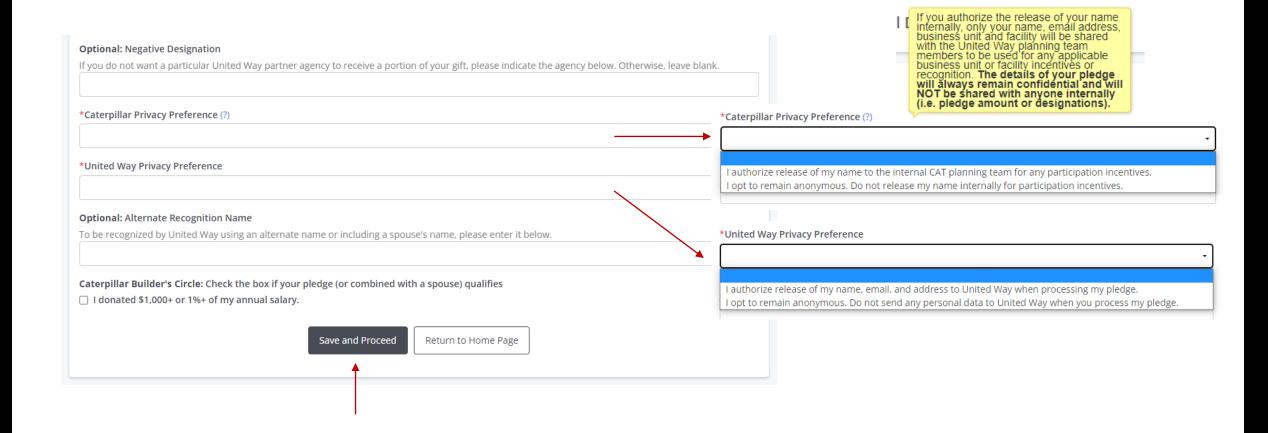
If you select you'd like \$10 to transfer from your stock/donor-advised fund, you would enter \$10 into the designation table. **Your donation amount must match the designation table total.** 



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)

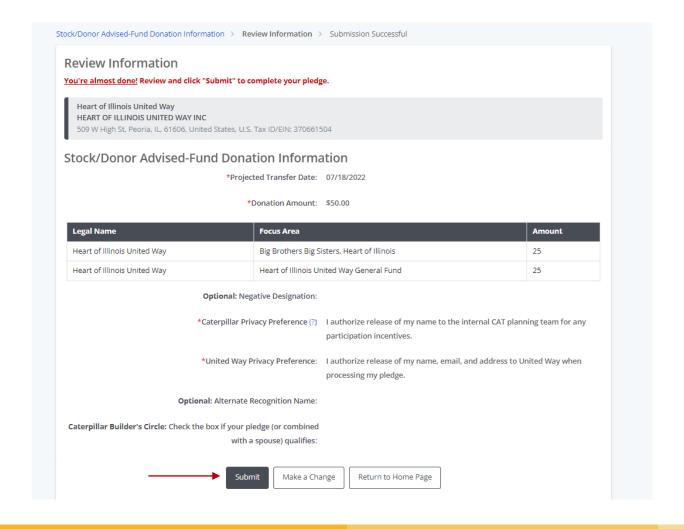






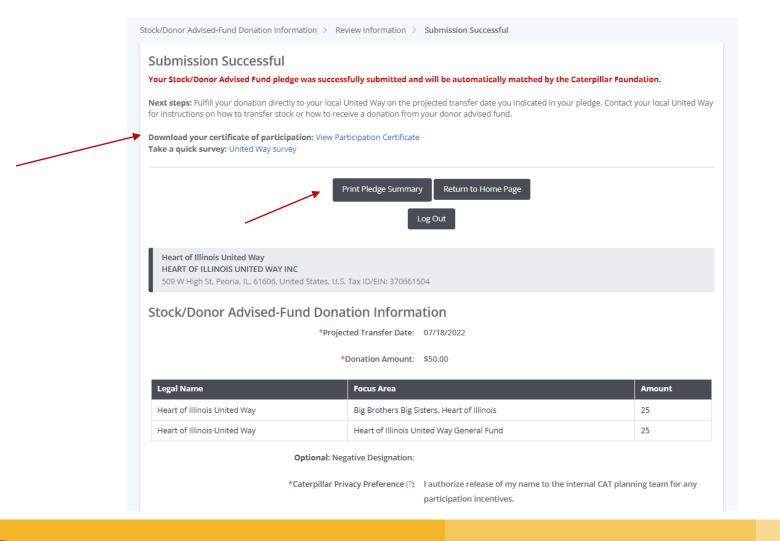








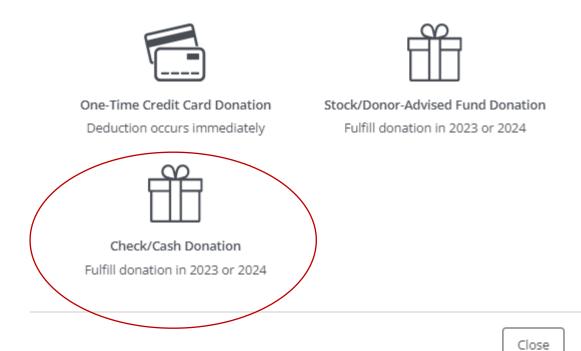








#### Please select one of the following:



CATERPILLAR FOUNDATION CATERPILLAR



| If you'd like to switch to a differe  |                             |                 |
|---|-----------------------------|-----------------|
| United Way chapter, click this lin  |                             |                 |
|   | McLean                      |                 |
| Click here to switch to a different United Way Chapter  | United Way of McLean County |                 |
| Cash/Check Gift Information   |                             | Cancel C 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 |                             |                 |
| *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. <b>Do not enter the "\$" symbol or a c</b> o                                |                             |                 |



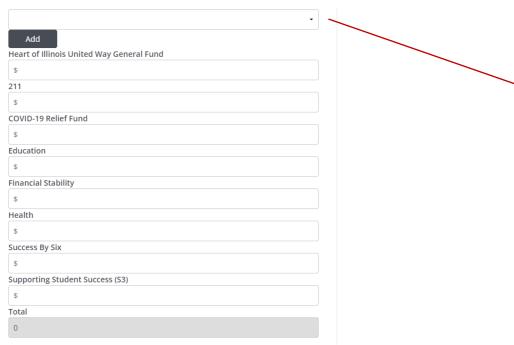


Using the designation table below, choose where you'd like your donation to go. Enter the amount you'd like directed to a United Way's General Fund, Focus Area(s) or United Way partner agencies.

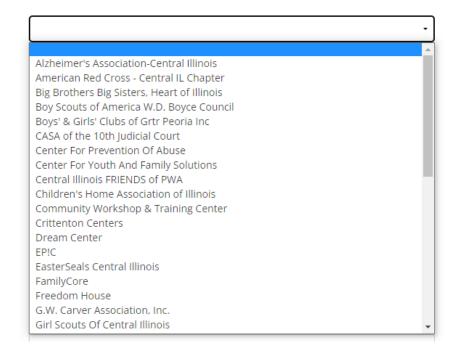
- \$1 minimum to United Way General Fund or Focus Area

- \$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)





| _                           | me, email, and address to United Way when processing my pledge.         |  |
|-----------------------------|---|--|
| I opt to remain anonymou    | Do not send any personal data to United Way when you process my pledge. |  |
|                             |   |  |
|                             |   |  |
|                             |   |  |
| atornillar Ruildor's Circlo | Check the hov if your pledge (or combined with a spouse) qualifies      |  |
| -                           | Check the box if your pledge (or combined with a spouse) qualifies      |  |
| aterpillar Builder's Circle |   |  |
| -                           |   |  |

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





