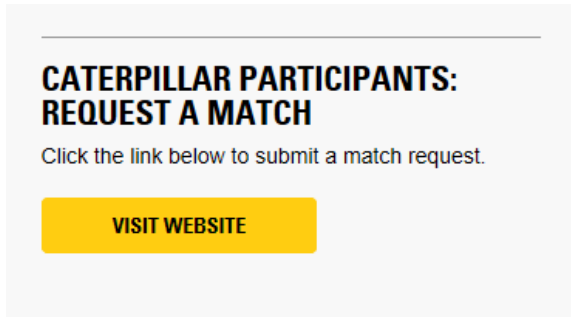
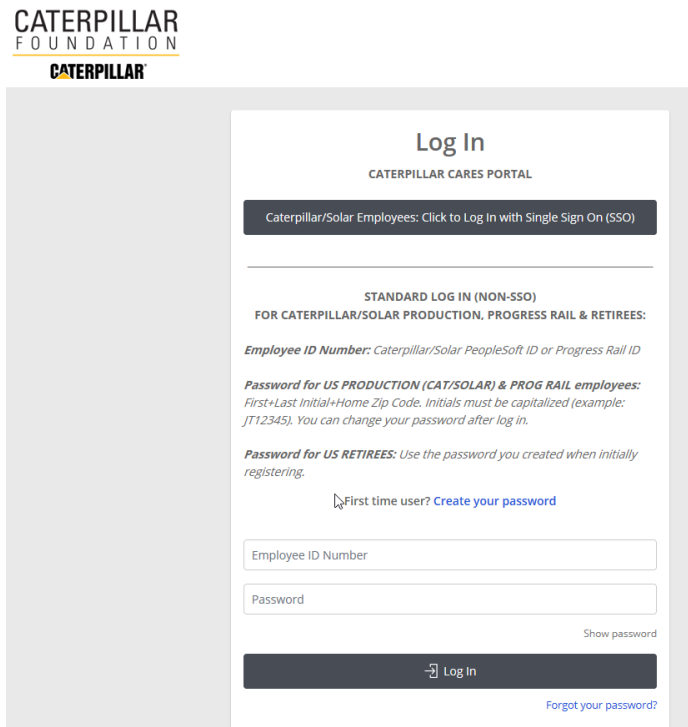


# Caterpillar Foundation Matching Gifts Program Process – St. Jude Runs

1. Visit [www.caterpillar.com/matching-gifts](http://www.caterpillar.com/matching-gifts) and click on “Visit Website” under “Caterpillar Participants – Request a Match”.



2. Register as a first-time user or login as an existing user. Use your 7-digit PeopleSoft or HR ID (found in Clues) (Make sure that you include the “0” at the beginning of your ID – 0\_ \_ \_ \_ \_ (7 #'s total))



### 3. Click “I Accept”, to the matching gifts terms and conditions.



#### 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.

#### YEAR-ROUND MATCHING GIFTS GIFT ELIGIBILITY REQUIREMENTS (SEPARATE FROM UNITED WAY)

\* Each Caterpillar participant may request an annual combined total maximum match of \$10,000 in each calendar year.

#### ELIGIBLE GIFTS MUST BE:

- \* Tax-deductible, charitable contribution of \$25 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.

#### YEAR-ROUND MATCHING GIFTS ELIGIBLE ORGANIZATIONS:

Eligible nonprofit organizations must be one of the following (excluding noted [Ineligible Nonprofit Organizations & Gifts](#)):

1. Recognized by and registered with the United States I.R.S. as a current 501(c)(3) nonprofit organization; or
2. Accredited public/private pre-K-12 schools or school districts in the United States to which contributions are tax deductible under the Internal Revenue Code of the United States.

*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.*

#### 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 NCEC coded school.

#### UNITED WAY CAMPAIGN

The Caterpillar United Way Campaign takes place each summer. The pledging site is now closed. Visit [www.caterpillar.com/unityway](http://www.caterpillar.com/unityway) for more information.

#### 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

### 4. From the home page, click “Submit a Matching Gift Request”.




Submit a Match Request for  
a 2021 Donation

\$10,000 total annual cap

## 5. Search for “St Jude Runs”.

HOME **MATCH REQUESTS** VOLUNTEER OPPORTUNITIES LOG VOLUNTEER HOURS



**Amplify your giving!**

The Caterpillar Foundation Matching Gifts Program provides an opportunity for employees and retirees to have their monetary contributions matched.

- 1 DONATE**  
Donate \$25+ to an eligible 501(c)(3) nonprofit or accredited public/private preK-12 school or district.
- 2 SUBMIT MATCH REQUEST**  
Search for the nonprofit below, enter the gift details & notify the nonprofit via email or mail. You have an annual combined total max match of \$10,000.
- 3 NONPROFIT CONFIRMS**  
The nonprofit receives the match request notification & verifies the tax-deductible gift amount.
- 4 FOUNDATION REVIEW & PAYMENT**  
Foundation reviews request on a quarterly basis and processes a 1:1 match of your donation.

### Matching Gifts Organization Search

Search for your organization by Name and State (optional) below.

St Jude Runs

State

Search

## 6. Click on “Select” next to St Jude Runs – Road Runners Club of America.

### Organization Search

If you're receiving too many results, try an [advanced search](#).

**PLEASE NOTE: 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. Organizations that do not align to the program guidelines will be rejected. Ex: Gifts made to nonprofits classified by the IRS as a church, political, or community foundation are not eligible. Also, United Way chapters are not eligible - they are supported and matched automatically with no cap through the separate annual Caterpillar United Way Appeal program.**

St Jude Runs

All states [Advanced search](#) **Search**

### Search Results

[Search Tips](#)

**ST JUDE RUNS** **ST JUDE RUNNERS ASSOCIATION** **Select**

4722 N SHERIDAN RD, PEORIA, IL, 61614-5926, United States, U.S. Tax ID/EIN: 37-1289235, jennifer.s.wanson.contractor@stjude.org

**7. Enter gift details. If you would like a specific Runner to get credit for this Matching Gift, please type the Runners Name and the Satellite City of the Run, they participate in (if known), in the “Designation” field. Click “Submit and Proceed.”**

### Donor Matching Gift Information

ST JUDE RUNS  
ST JUDE RUNNERS ASSOCIATION  
4722 N SHERIDAN RD, PEORIA, IL, 61614-5926, United States, U.S. Tax ID/EIN: 37-1289235,  
jennifer.swanson.contractor@stjude.org

\*Gift Date  
02/08/2021

\*Total Gift Amount  
Enter gift amount for the donation paid on the gift date above OR the lump sum contributed to the nonprofit for the calendar year (must be paid in full prior to submission).  
\$25.00

\*Match Amount Requested  
You can request that the full amount OR only a portion of your donation be matched. You have a combined total maximum match allowance of \$10,000 in each calendar year.  
\$25.00

\*Gift Payment Method  
Check/Cash

Designation  
If applicable, enter the designation of your initial donation such as a specific program, department, run/runner's name, etc. Please note, however, that the Foundation matching payments are unrestricted.  
John Smith - "Satellite Run City"

Save and Proceed    Return to Home Page

**8. Review, update, if necessary, and then click “Submit”.**

### Review Matching Gift Request

Please review your matching gift request and click "Submit". Once you click submit you will be unable to make changes to the request.

ST JUDE RUNS  
ST JUDE RUNNERS ASSOCIATION  
4722 N SHERIDAN RD, PEORIA, IL, 61614-5926, United States, U.S. Tax ID/EIN: 37-1289235, jennifer.swanson.contractor@stjude.org

### Donor Matching Gift Information

\*Gift Date: 02/08/2021

\*Total Gift Amount: \$25.00

\*Match Amount Requested: \$25.00

\*Gift Payment Method: Check/Cash

Designation: John Smith - "Satellite Run City"

Submit    Make a Change    Return to Home Page

## 9. Click “Email Match Request To Nonprofit” or “Print And Mail Request To Nonprofit”.

### Mail or Email Request to Nonprofit

**You're almost done!** Your matching gift request was successfully submitted, however, you are now required to EMAIL -OR- PRINT AND MAIL your generated matching gift receipt to the nonprofit (please ONLY send the receipt to individuals that directly work for the nonprofit you donated to). Please click one of the links below to proceed.

[EMAIL MATCH REQUEST TO NONPROFIT](#)

[PRINT AND MAIL MATCH REQUEST TO NONPROFIT](#)

ST JUDE RUNS  
ST JUDE RUNNERS ASSOCIATION  
4722 N SHERIDAN RD, PEORIA, IL, 61614-5926, United States, U.S. Tax ID/EIN: 37-1289235, jennifer.swanson.contractor@stjude.org

### Donor Matching Gift Information

\*Gift Date: 02/08/2021

\*Total Gift Amount: \$25.00

\*Match Amount Requested: \$25.00

\*Gift Payment Method: Check/Cash

Designation: John Smith - "Satellite Run City"

[Return to Home Page](#)



# 11. Scroll down to the bottom of the page and click “Send”.

## Preview Email Match Request to Nonprofit

Please review the information below for accuracy.

Then click the "Send" button at the bottom of this page to proceed in sending this email request.

\*Name: Jane Doe  
\*Reply-To: Doe\_Jane\_A@cat.com  
\*Recipient(s): jennifer.swanson.contractor@stjude.org  
\*Subject: Caterpillar Matching Gift Request from Michael Todd Swanson  
Message:

### Caterpillar Matching Gift Request

Nonprofit Name: St Jude Runs

Nonprofit Email Address: [jennifer.swanson.contractor@stjude.org](mailto:jennifer.swanson.contractor@stjude.org)

Congratulations  has submitted a matching gift request to your nonprofit through the Caterpillar Foundation Matching Gifts Program.

Matching Program: 2021 Matching Gifts

Donor Name:

Gift Date: 02/08/2021

Donation Amount: \$25.00

Match Amount Requested: \$25.00

Projected Caterpillar Foundation Match Amount: \$25.00

Gift Payment Method: Check/Cash

Designation: John Smith - "Satellite Run City"

Gift ID to Locate Match Request: 210274409

Please visit [www.caterpillar.com/matching-gifts](http://www.caterpillar.com/matching-gifts) and select the 'Nonprofit Participants - Verify a Match' link to confirm the request. \*You must verify the match by February 15 of the year following the donation.

Once logged in, please follow the instructions below:

- Select the **Matching Program noted on the match request receipt** you received from the donor.
- Read the program guidelines and click **I ACCEPT**.
- Enter, update, or verify your **nonprofit contact and ACH information** (we do not process paper checks).
- Locate the gift using the donor's last name and the following Gift ID: **210274409**
- Enter the tax deductible amount of the gift and click **Submit**.
- **Requests will be reviewed by the Caterpillar Foundation and matched to nonprofits on a quarterly basis.**

\*For questions, please email [Matching\\_Gifts@cat.com](mailto:Matching_Gifts@cat.com).