

Charitable contributions made in cash or securities by full- and part-time Capital associates to an eligible organization may qualify for a CGC match. The contribution must be a personal gift from the eligible associate. It must be paid, not merely pledged, on or after their hire date with Capital and the match may not be used to fulfill a pledge commitment. In the case of a contribution for which a tangible benefit is received (such as a dinner, golf tournament, gala, membership, etc.), only the tax-deductible amount will be matched. In-kind donations and contributions made to purchase an item at an auction are not eligible for a match. Retired associates remain eligible for the program for two full fiscal years after the date of their retirement.

What organizations are eligible?

All nonprofit organizations and institutions located in Canada,¹ Hong Kong, Japan,² Singapore, Switzerland, United Kingdom and United States that are recognized as tax-exempt public charities or publicly supported charities by the government of that country are eligible. Categories include arts and culture, athletics, education, environmental/animal welfare, health, international and social and human services. Religious organizations are ineligible with the exception of nonsectarian programs such as schools, community outreach, homeless shelters or food banks that they administer. Fraternal organizations are ineligible with the exception of affiliated scholarship foundations. Political organizations and professional associations are not eligible.

Nonprofit organizations and institutions in the United States must be recognized by the Internal Revenue Service as tax-exempt under Section 501(c)(3) of the Internal Revenue Code *and* as a public charity under section 509(a)(1), 509(a)(2) or 509(a)(3) of the Code, or qualify as a governmental unit.

Donations to an associate's private personal foundation or donor-advised fund are not eligible. However, contributions made from an associate's personal foundation or donor-advised fund are eligible if the recipient organizations are eligible.

¹Only TNO associates can have their contributions matched to nonprofit organizations in Canada.

²Only TKO associates can have their contributions matched to nonprofit organizations in Japan.

How much will CGC match?

- Up to a maximum of \$2 for every \$1 contributed (2:1)
- Minimum personal associate donation: \$100 (may have been paid over 12 months)
- Maximum Capital donation: \$5,000 per fiscal year, July 1 – June 1
- Maximum number of matching gifts forms an associate may submit per fiscal year: **eight** (totaling no more than \$5,000 paid by Capital)

Donation timeline

- Forms must be received within 12 months of donation.
- Forms must be received between July 1 and June 1 to be processed within that fiscal year. **Forms received after June 1 will be held until July 1 — the beginning of the next fiscal year.**

How to apply for a match

1. Confirm with the organization that it meets the eligibility criteria described above.
2. Complete Part A of this form. Please print clearly.
3. Mail the form with your donation to the recipient organization. The donation must have been paid, not pledged.
4. When the completed matching gifts request form and documentation have been received from the recipient organization and eligibility has been verified, payment will be sent for the matching amount and you will be notified. (Please follow up with the organization to ensure that the form is returned, especially for those mailed late in the fiscal year.)

Capital reserves the right to determine the eligibility of the associate and the organization or institution under this program. Capital also reserves the right to change, revoke, suspend or terminate this program at any time without prior notice to any associate, organization or institution involved.

For further information, go to the "Charitable Giving" page on CGWeb.

A. Associate

Please complete this section and send this form with your check to the recipient organization. Keep a copy of both for your records.

| | | | |
|-------|----|------|-----------------------|
| First | MI | Last | CGC initials / office |
|-------|----|------|-----------------------|

| |
|--------------------------------|
| Name of recipient organization |
|--------------------------------|

| |
|----------------------------|
| Name of program (optional) |
|----------------------------|

| | |
|---------------------------------------|---|
| Amount of associate donation \$_____. | Date of gift(s) (month/day/year) Must have occurred in the last 12 months. _____. |
|---------------------------------------|---|

| |
|---|
| Please make a matching gift of: \$_____. (Not to exceed maximum 2:1 match.) |
|---|

Neither I nor anyone related to me will receive any material benefit (e.g., membership benefits, event tickets, goods bought at auction) from this match if distributed, nor will this gift match fulfill a pledge commitment.

Signature of associate: _____ Date: _____
month/day/year

B. Recipient (to be completed by the organization)

Please allow six to eight weeks for processing after we receive a completed form from the organization. We regret that incomplete forms will not be processed. The Capital Group Companies must receive this form by June 1.

| | | | |
|-----------------------------|-------|----|------|
| Name of authorized officer: | First | MI | Last |
|-----------------------------|-------|----|------|

| | |
|-------|-------|
| Title | Phone |
|-------|-------|

| | |
|---|-----------------|
| Name of organization as it should appear on check | Tax I.D. number |
|---|-----------------|

| |
|---|
| Complete address (check will be mailed to this address) |
|---|

| | | |
|------|-------|-----|
| City | State | ZIP |
|------|-------|-----|

For U.S. nonprofits, one of the following forms MUST be enclosed to receive funds (please check one).

- For a nonprofit organization or institution:**
501(c)(3) federal determination letter verifying that this organization or institution is tax-exempt within the meaning of Section 501(c)(3) of the Internal Revenue Code and is a public charity within the meaning of Section 509(a)(1), 509(a)(2) or 509(a)(3) of the Code
- For a public school:**
Paragraph on district letterhead certified by principal, stating school is operating within district
- For a nonsectarian unit of a religious organization:**
In addition to 501(c)(3), front page of governing religious directory and page where organization is listed
- For a unit of government:**
Documentation from governing authority confirming that the organization is a unit of government

I hereby acknowledge receipt of the 100% tax-deductible gift described in Part A above and certify that this organization or institution qualifies as a tax-exempt public charity in good standing with the government of the United States.

Signature of authorized officer: _____ Date: _____
month/day/year

C. Return form to: Corporate Charitable Giving Department
Capital Group Companies Global
400 South Hope Street
Los Angeles, California 90071
Phone (800) 421-8511
Fax (213) 615-0615