

Matching Gift Program Guidelines



To encourage and support the generosity and community involvement of employees and retirees, Duke Energy offers The Duke Energy Foundation Matching Gift Program which provides matching funds to the charitable organizations employees and retirees personally support. To maximize the impact, Duke Energy matches, dollar for dollar, donations made by eligible participants to educational institutions and .50 for dollar for donations made to all other charitable organizations, up to \$5,000 per donor per calendar year. The Duke Energy Foundation reserves the right, in its sole and absolute discretion, to refuse payment of a matching gift to any nonprofit organization, if the Foundation believes or determines that such organization's actions or values are not aligned with The Duke Energy Foundation philanthropic goals. The Duke Energy Foundation reserves the right to further restrict gifts based on the availability of funds.

WHO CAN PARTICIPATE?

- Regular, full-time employees who have worked at least 30 days.
- Part-time employees who have worked for at least one year with the company.
- Retired employees who receive benefits from Duke Energy Corporation.
- Active members of the Board of Directors of Duke Energy Corporation.
- Gifts from Spouses or Survivors are not eligible.

Note: All eligible employees/retirees in the U.S. may donate funds for gift matching to qualified charitable organizations.

WHICH INSTITUTIONS QUALIFY TO RECEIVE MATCHING FUNDS?

To receive funds, all organizations must be a U.S. nonprofit with a 501(c)(3) designation by the Internal Revenue Service (IRS) or a U.S. governmental subdivision.

WHAT CONTRIBUTIONS ARE ELIGIBLE?

- Must be a personal gift, from the donor's personal funds, which has been paid and not simply pledged. The minimum gift eligible for matching is U.S. \$50.
- The maximum amount matched per employee per year is U.S. \$5,000.
- Contributions to educational institutions will be matched 1:1; contributions made to all other approved institutions or organizations will be matched .50:1.
- Gifts must be personal contributions made directly to approved institutions/organizations.
- The donor's limit is based on the date of the gift.
- Gifts must be in the form of cash, check, credit card, or marketable securities with a quoted market value. Gifts of securities are valued based on the closing price on the date of contribution. No other form of personal or real property will be matched.
- The Duke Energy Foundation reserves the right to further restrict gifts based on the availability of funds.

WHAT GIFTS ARE NOT ELIGIBLE FOR MATCHING?

- Any contribution that results in a personal benefit or privilege to the donor, the donor's family or anyone designated by the donor.
- Gifts for building construction or maintenance.
- Alumni(ae) dues or dues for similar groups.
- Tuition payments, contributions made in lieu of tuition or fees, tickets, dues, meals, parking or other benefit.
- Subscription fees for publications.
- Gifts of real estate or personal property.
- Contributions made from money given to the donor by a third party with the understanding that the donor would make a contribution to a specific institution or cumulative gifts from several individuals reported as one contribution.
- Gifts intended to fulfill the tithe or any church-related financial commitment.
- Bequests; life income trust arrangements; any gift that restricts the immediate use of funds by the U.S. nonprofit.
- Insurance premiums.

- Gifts or payments for primarily political or religious purposes.
- Membership dues for which benefits are received.
- Duke Energy does not match Charitable Remainder Trusts. The company does not match gifts in which the donee does not have immediate use of those funds from the donor.

HOW THE PROGRAM WORKS

The employee should:

- Complete Part 1 of the form.
- Mail the *original* form, with the donation and any other necessary documentation, to the institution of your choice that meets the criteria listed in the guidelines. (Faxed copies will not be accepted.)
- The matching amount provided by Duke Energy will be designated for the same use as the original gift. If there is no designation, the matching gift will be undesignated.

The recipient organization should:

PLEASE NOTE: BY COMPLETING THE MATCHING GIFT FORM ONLINE, THE RECIPIENT ORGANIZATION DOES NOT NEED TO COMPLETE ANY PAPERWORK.

- Complete Part 2 of the *original* application form.
- The authorized officer of the charity must verify the donation, sign the application and return the *original* form to The Duke Energy Foundation Matching Gift Program, P.O. Box 8499, Princeton, NJ 08543-8499.

All matching gifts will be made in U.S. currency. Eligible gifts are processed and matched to institutions on a bi-monthly schedule. Below is the anticipated schedule (**dates are subject to change**).

Gifts Verified By:	Matching Gift Paid By:
January 1	February 15
March 1	April 15
May 1	June 15
July 1	August 15
September 1	October 15
November 1	December 15

IS THERE A TIME LIMIT FOR MATCHING MY GIFT?

Gifts must be registered within 90 days of the date of payment by cash, check, credit card, or traded securities. Gifts registered after that time will not be eligible. All gifts must be verified by the recipient institutions in order to be matched.

For more information, please contact the Matching Gift Program via phone at 1-866-604-5486, via e-mail at duke@easymatch.com or visit the Matching Gift Program Website at <https://www.easymatch.com/duke-energy>.

Duke Energy reserves the right to interpret any request in administering the program, and may suspend, amend, or discontinue the program at any time.

Matching Gift Program Request Form



INSTRUCTIONS

You may also register your request online at <https://www.easymatch.com/duke-energy>.

- PLEASE NOTE THAT BY COMPLETING THE FORM ONLINE, THE RECIPIENT ORGANIZATION DOES NOT NEED TO COMPLETE ANY PAPERWORK.
- COMPLETING THE PAPER FORM VERSUS SUBMITTING REQUEST ONLINE WILL DELAY PROCESSING YOUR MATCHING GIFT.

Donor:

- Complete Part 1 of this form — one for each gift. *Please print or type.*
- Send the form with your contribution to the recipient organization.

Recipient Organization:

- Verify receipt of gift and complete Part 2 of this form. *Please print or type.*
- If this is your first matching gift request to The Duke Energy Foundation Matching Gift Program, enclose a copy of your Internal Revenue Service 501(c)(3) IRS determination letter and a brief description of your organization's primary purpose.
- Forward form to the address printed below.

PART 1 - DONOR SECTION

Note: Contributions to Educational Institutions will be matched 1:1; contributions made to all other approved institutions or organizations will be matched .50:1.

EMPLOYEE ID NUMBER

NAME

HOME ADDRESS

CITY/STATE/ZIP CODE

BUSINESS TELEPHONE, INCLUDING AREA CODE

E-MAIL ADDRESS

NAME OF RECIPIENT INSTITUTION

EXACT DATE OF GIFT

\$

AMOUNT OF GIFT (MIN U.S. \$50)

AMOUNT OF GIFT TO BE MATCHED: \$

Type of gift: Please check one:

- Cash Check Credit Card Stock

IF STOCK, NUMBER OF SHARES AND NAME OF STOCK

DESIGNATION OR PURPOSE (IF ANY)

I certify that neither my family nor I will derive any direct or indirect financial or material benefit from this contribution. I certify that this contribution does not represent payment for tuition, services or other personal financial obligations. I certify that this total is my own personal contribution only and not the result of a third-party or group donation. I further certify this contribution is not in support of an athletic fund, foundation, facility, or scholarship. I have read and understood the guidelines of The Duke Energy Foundation Matching Gift Program.

DONOR SIGNATURE

DATE

PART 2 - RECIPIENT SECTION

EMPLOYER IDENTIFICATION NUMBER (EIN)

NAME OF RECIPIENT INSTITUTION

ADDRESS

CITY/STATE/ZIP CODE

BUSINESS TELEPHONE, INCLUDING AREA CODE

(All organizations must enclose a copy of the IRS 501(c)(3) Certificate of Tax Exemption, unless previously submitted to The Duke Energy Foundation Matching Gift Program.)

WHICH BEST DESCRIBES YOUR ORGANIZATION'S PRIMARY MISSION?

- | | |
|---|--|
| <input type="checkbox"/> Arts and Culture | <input type="checkbox"/> Civic |
| <input type="checkbox"/> Community Impact | <input type="checkbox"/> Community Leadership |
| <input type="checkbox"/> Health and Human Services | <input type="checkbox"/> Economic Development |
| <input type="checkbox"/> Higher Education/Research | <input type="checkbox"/> Leadership |
| <input type="checkbox"/> Pre K-12 Education | <input type="checkbox"/> Technical/Community College |
| <input type="checkbox"/> Environmental Conservation, Education and Research | |

I hereby certify that this organization/program meets the eligibility requirements of The Duke Energy Foundation Matching Gift Program, and that neither the donor nor Duke Energy will derive any personal material benefit from this gift or match.

AUTHORIZED OFFICER'S NAME/TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZED OFFICER

DATE

MAIL COMPLETED FORM AND ANY REQUIRED ENCLOSURES TO:

The Duke Energy Foundation Matching Gift Program
P.O. Box 8499
Princeton, NJ 08543-8499

Phone: 1-866-604-5486

E-mail: duke@easymatch.com

Website: <https://www.easymatch.com/duke-energy>