

# GUIDELINES & FREQUENTLY ASKED QUESTIONS



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one donation at a time.

PARTNERSHIP  
FOR GIVING

## GUIDELINES & FREQUENTLY ASKED QUESTIONS

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The Partnership for Giving is Merck's year-round matching funds program that gives employees and retirees the opportunity to support community efforts and organizations that are important to them. Contributions to eligible organizations are matched by The Merck Company Foundation.

Support organizations in the following categories:

- ♥ Health and Human Services
- ♥ Arts and Culture
- ♥ Education
- ♥ Animal Welfare **New!**
- ♥ Environmental **New!**

Visit [www.merckp4g.com](http://www.merckp4g.com) during the fall to make your payroll deduction pledge or to change a current pledge.

Merck will match contributions year-round to eligible organizations through the Direct Giving option.

To learn more, visit [www.merckp4g.com](http://www.merckp4g.com).  
Questions? Call 1-866-205-2857 E-mail [merckp4g@easymatch.com](mailto:merckp4g@easymatch.com)

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## Merck Partnership for Giving Guidelines

### Mission

Through the Partnership for Giving, Merck helps employees and retired employees support community efforts and organizations that are important to them. Working together, Merck and its active and retired employees will help build strong and caring communities by helping those in need, promoting a healthier society, advancing education, fostering the arts, addressing the welfare of animals, and preserving the environment.

### Donor Eligibility

Active U.S. and Puerto Rico-based employees (full- and part-time), retired U.S. employees, and members of Merck's board of directors are eligible to participate in the Partnership for Giving.

\* The Partnership for Giving matching gift benefit is available to legacy Merck employees in the U.S. and former legacy Merck employees in the U.S. who are considered retirees and to legacy Schering employees in the U.S.; it is not available to legacy Schering employees who are considered retirees.

### Organization Eligibility

Health and human services agencies whose primary mission is to provide a health and human service, educational institutions (K-12 and higher education accredited by a nationally recognized accrediting agency or by state departments of education), and arts and culture, animal welfare, and environmental organizations are supported through the Partnership for Giving. These organizations must be described in sections 501(c)(3) and 509(a) or be instrumentalities of federal, state, or local government as provided by section 170(c)(1). The organizations must be based in the United States.

### I. Health and Human Services

Health organizations are those that seek to eliminate or control medical conditions caused by disease, genetics, injury, or environmental factors. Human services organizations are those whose programs and activities focus on the prevention, alleviation, or control and management of the effects of problems caused by human, natural, or biologic circumstances while seeking to improve the quality of life for this affected population. There is a special focus on the ill and the needy, including those with physical or emotional disabilities,

those who have problems with personal or social relationships, or those who are economically disadvantaged. These programs and activities serve the total range of the population at large and encompass the human life span, from infancy through old age. Organizations that are considered health and human services include, but are not limited to, organizations that raise funds to support or provide services in the following areas: disease or disorder control or elimination; blood banks; mental-health care; free clinics; reproductive-healthcare facilities (including obstetric and gynecologic clinics); family planning centers; prenatal care; rehabilitative medical services; physical-therapy services (including per-therapy organizations); speech and hearing centers; emergency medical transport (EMT) services; home healthcare (including visiting nurse associations and similar organizations that provide nursing care and related health services to homebound patients who might otherwise require care in an institution); hospices; organizations involved with alcohol, drug, or substance abuse or dependency prevention and treatment; suicide prevention; organizations involved with addictive disorders; counseling and support groups; and multipurpose organizations that provide a broad range of services to individuals or families, such as the Salvation Army, the American Red Cross, Catholic Charities, United Way, and Make-A-Wish Foundation.

**II. Education**  
Educational associations supported by the Partnership for Giving are those that are fully accredited by nationally recognized accrediting agencies, or by state departments of education. These include:

- Primary schools
- Secondary schools
- College preparatory schools
- Technical institutions
- Two-year junior and community colleges
- Colleges and universities
- Professional and graduate schools
- National, regional, or state associations of educational institutions, such as the United Negro College Fund and the Independent College Funds of America, whose sole purpose is to raise funds on behalf of its members

### III. Arts and Culture

The Partnership for Giving supports organizations and activities that promote, produce, or support works, discussions, or appreciation related to the humanities (literature, art, music, history, and philosophy). This also includes organizations that contribute to an aesthetic quest for knowledge (science and philosophy) through the human interpretation of and speculation on the surrounding environment. Arts and culture includes, but is not limited to, botanical gardens; ethnic awareness; folk and traditional arts; arts education/schools of art (schools and organizations that promote education in a variety of artistic disciplines, including performing arts schools); arts councils/agencies (organizations that provide funding, management, and programming services for a variety of art agencies in a specific geographic locale); architecture centers; opera companies; symphony orchestras; singing or choral groups; ballet companies; dance organizations; music (can include organizations that are considered performing arts centers); and theaters and theater groups. Also included are humanities organizations (organizations that promote the study, teaching, or appreciation of the humanities, such as archaeology, art history, modern and classical languages, philosophy, and ethics). Arts and culture may also include historical societies, activities, or preservation centers; genealogical activities and organizations; publishing activities; cultural exchanges with other countries; radio stations that are not members of the Public Broadcasting Service (PBS); PBS (includes National Public Radio [NPR] and Corporation for Public Broadcasting [CPB] stations); museums (includes science museums, planetariums, and hobby museums); libraries; and zoos.

### IV. Animal Welfare

Organizations addressing the welfare of animals. Animal welfare organizations that conduct significant lobbying and/or litigation activities are ineligible.

### V. Environmental Organizations

Nonprofit environmental and conservation organizations primarily focused on activities that are open to and operated for the benefit of the general public (for example, Nature Conservancy and World

Wildlife Fund). Environmental organizations that conduct significant lobbying and/or litigation activities are ineligible.

### IRS Charitable Requirement

Your gift must be a voluntary charitable contribution made from your own personal resources and not from gifts or loans from any other person or organization. As a charitable contribution, your gift cannot be used to pay tuition, membership dues, or subscription fees; it cannot be used as payment in exchange for any kind of benefit received; and it cannot be given because you expect some monetary or other benefit to be given to you or to any other person or organization named by you. In addition, your gift cannot be used for religious or political purposes.

### Giving Methods

Cash, check, credit card, or stock are options available for Direct Giving donations.

A fixed-dollar deduction per pay period is the only option for Payroll Deduction donations.

### Program Dates

The direct giving option is available to eligible donors year-round. The matching funds limit will be tracked on a calendar-year basis (January 1 through December 31).

The payroll deduction option is available to eligible donors only during the payroll deduction enrollment period in the fall of each year. Special reminders and promotion will take place to announce the payroll deduction enrollment period.

### Minimum/Maximum Program Limitations

The minimum gift is \$24 per designated organization. Donations of less than \$24 per organization will not be matched through the Partnership for Giving.

There is no maximum gift total. However, the maximum gift total that will be matched is \$50,000 per eligible donor per calendar year.

The Foundation's matching funds are made on an unrestricted basis even though you may designate how you want your personal gift used.

### How to Request Matching Funds

#### Direct Giving

You may request matching funds for *one-time cash, check, credit card, or stock gifts* by using the Partnership for Giving online tool.

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Requests should be made within 180 days of your contribution. To register your gift using this online tool, please visit the Partnership for Giving website ([www.merckp4g.com](http://www.merckp4g.com)).

You may also request matching funds for *one-time check or stock gifts* using paper matching funds request forms. Either download a form from the Partnership for Giving website ([www.merckp4g.com](http://www.merckp4g.com)) or request that a form be sent to you by calling the Partnership for Giving toll free at 1-866-205-2857.

After verification that your gift has been received by the organization and that the organization qualifies for matching funds, a check will be forwarded to them by the Partnership for Giving, identifying you as the donor. Matching gifts are processed quarterly. Eligible requests received by the last day of March, June, September, or December are included in the current quarter's payment. Requests that arrive after these dates are processed during the following quarter.

#### Payroll Deduction

Payroll Deduction gifts can only be made during the payroll deduction enrollment period in the fall of each year. You may make your payroll deduction pledge using the online pledging tool or by completing and submitting a paper pledge form. Changes (including cancellations and organization changes) to current payroll deductions may also be made during the enrollment period. Payroll deduction pledges automatically "rollover" to the next year. To make a payroll deduction pledge online, please visit the Partnership for Giving website ([www.merckp4g.com](http://www.merckp4g.com)). To use a paper pledge form, either download a form from the Partnership for Giving website ([www.merckp4g.com](http://www.merckp4g.com)) or request that a form be sent to you by calling the Partnership for Giving toll free at 1-866-205-2857.

If you choose ongoing payroll deduction, your funds will be disbursed to your designated organization(s) on a quarterly schedule beginning in April of the following year. Funds will be sent out approximately eight weeks following the end of a quarter. The Merck matching funds are sent on the same quarterly schedule and are included in the same check. A quarterly disbursement schedule is efficient and reduces the administrative expenses for Merck and the recipient organization(s). The minimum disbursement threshold is \$100 per organization. At the end of the quarter, if the total payroll deduction amount from

all donors to an organization is less than \$100, the funds will be held until the accumulated amount reaches the minimum threshold or until payroll deduction for the pledge year is completed. Setting this minimum reduces administrative expenses for Merck and the recipient organization(s).

#### Unclaimed Payroll Deduction Donations

If the designated qualified organization does not cash the checks it receives through the Partnership for Giving, it will receive three follow-up letters from the Partnership for Giving vendor as a reminder to cash the checks. Follow-up letters will be sent at 90, 120, and 150 days after the original transmittal of the funds by the vendor to the designated organization. After 180 days, if the checks are still not cashed by the organization, the checks will be voided and the employee donations and the Merck matching funds will be sent to the United Way in the community in which the donor lives.

#### Tax Receipts

**To claim a tax deduction for any single donation to a single organization, donors must first obtain a tax receipt from the recipient organization. Not all organizations automatically send donors tax receipts. It is the responsibility of donors to follow up with an organization if they have not received a tax receipt. Neither Merck nor the Partnership for Giving can produce tax receipts.**

In order to receive a tax receipt from the charity, when you pledged through the Campaign, you must have authorized the program to release your name and address to the charity. Each charity was then asked to log on to the Agency Portal and indicate whether it wanted to provide a tax receipt for employee donations or allow The Merck Partnership for Giving to provide a tax receipt on its behalf.

To view the option selected by your charity, log on to the Partnership for Giving website and click **Giving History** and select the year for which you are looking to receive a tax receipt. All donations you made through the Campaign will display. Go to the last column, **Show Detail**, and click **Show Detail**.

If your charity gave the Merck Partnership for Giving permission to create the receipt, the following message displays: *Tax Recordkeeping Documentation. Please print this page as your receipt for your charitable donation.*

If the charity wants to produce its own tax receipt, the following message displays: *Recordkeeping Documentation: Please contact the [Name] Charity if you need a tax receipt for this donation.* Some charities will send the tax receipt automatically, other charities will not send a receipt unless the donor requests one. If you need a receipt and have not received one, please contact the charity directly.

#### Administration

The Merck Partnership for Giving reserves the right not to match gifts to any organization that it may determine is not an appropriate recipient for charitable funds.

The Partnership for Giving program may be revised, suspended, or terminated at any time at the option of The Merck Company Foundation. Its determination on any questions of interpretation, application of provision, or administration shall be final.

#### Charitable Flex Fund

The Charitable Flex Fund is an organization selection made available through the Partnership for Giving but is managed and administered by the Bergen County United Way.

This is how it works:

- Make your donation to the Charitable Flex Fund as a one-time gift or as a payroll deduction pledge.
- Merck matches your donation 100% up to a limit of \$30,000 per eligible donor per year (minimum donation of \$100 is required).
- Both your donation and the Merck matching funds will be deposited in your name to your individual Charitable Flex Fund account.
- You'll receive a welcome package via mail providing you with your personal identification number (PIN).

**If you are giving directly to your account, you must request matching funds through the Partnership for Giving Direct Giving option.**

- Once your individual account has been set up, you can log on to the secure Flex Fund website ([www.myflexfund.org/merck](http://www.myflexfund.org/merck)) using your PIN to view your current available Flex Fund account balance and make distributions to organizations that are eligible through the Partnership for Giving at your convenience.
- To experience how the Flex Fund works, please visit the *test site* at [www.myflexfund.org/merckdemo](http://www.myflexfund.org/merckdemo). Enter "test" as the last name and 1111 as the PIN.

- You may use the website to designate amounts you wish to distribute to eligible organizations throughout the year using the funds in your account. A minimum distribution of \$25 per agency is required for each designation you make.
- Merck is not responsible for any aspect of the administration of the Charitable Flex Fund, including Internet security and fiduciary accountability.

**For more information about the Charitable Flex Fund, please contact Flex Fund customer service representatives at 1-800-543-1203.**

**Detailed Charitable Flex Fund guidelines and FAQs can be found on the Partnership for Giving website ([www.merckp4g.com](http://www.merckp4g.com)).**

#### **Gifts That Will Not Be Matched by the Foundation**

Payments such as the following are not eligible for matching funds by the Foundation:

- Bequests and deferred giving plans
- Combined gifts from a group of people represented as one gift from an eligible donor
- Dues payable to alumni groups or subscription fees for publications
- Gifts of real estate or other property (except securities)
- Gifts given through a third party or gifts given to an educational institution or hospital as a way of supporting a third-party organization (e.g., an athletic, religious, or social organization)
- Gifts intended to fulfill a person's pledges, titles, or other church-related financial commitments
- Gifts to support extracurricular activities such as athletics (including athletic clubs), marching bands, and yearbooks
- Premium payments for insurance with the institution named as a beneficiary
- Payments of tuition or other fees
- Pledges not paid
- Gifts to rifle, civic, or economic development organizations
- Gifts to houses of worship (e.g., churches, synagogues, etc.)
- Contributions to religious programs or organizations whose principal purpose is propagating a particular religious faith, creed, or doctrine (e.g., missions, church planting projects, religious orders, etc.)
- Gifts to support capital expenditures

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## Merck Partnership for Giving Frequently Asked Questions (FAQs)

### General FAQs

**What is the Merck Partnership for Giving?**  
 The Merck Partnership for Giving is a matching funds program that enables eligible Merck donors to make contributions to qualifying organizations. The contributions are then matched by The Merck Company Foundation. Generally, if the donor's contribution adheres to the Partnership for Giving program guidelines, the request for matching funds will be honored. However, The Merck Company Foundation reserves the right not to match gifts to any organization that it determines is not an appropriate recipient for charitable funds.

**Who is eligible to participate in the Partnership for Giving?**  
 Active U.S. and Puerto Rico-based employees (full- and part-time), retired U.S. employees, and members of Merck's board of directors are eligible to participate in the Partnership for Giving.

\* The Partnership for Giving matching gift benefit is available to legacy Merck employees in the U.S. and former legacy Merck employees in the U.S. who are considered retirees and to legacy Schering employees in the U.S.; it is not available to legacy Schering employees who are considered retirees.

**What organizations are eligible to receive matching funds through the Partnership for Giving?**  
 Health and human services agencies whose primary mission is to provide a health and human service, educational institutions (K-12 and higher education accredited by a nationally recognized accrediting agency or by state departments of education), and arts and culture, animal welfare, and environmental organizations are supported through the Partnership for Giving. These organizations must be described in sections 501(c)(3) and 509(a) or be instrumentalities of federal, state, or local government as provided by section 170(c)(1). The organizations must be based in the United States.

**I. Health and Human Services**  
 Health organizations are those that seek to eliminate or control medical conditions caused by disease, genetics, injury, or environmental factors.

Human services organizations are those whose programs and activities focus on the prevention, alleviation, or control and management of the effects of problems caused by human, natural, or biologic circumstances while seeking to improve the quality of life for this affected population. There is a special focus on the ill and the needy, including those with physical or emotional disabilities, those who have problems with personal or social relationships, and those who are economically disadvantaged. These programs and activities serve the total range of the population at large and encompass the human life span, from infancy through old age.

Organizations that are considered health and human services include, but are not limited to, organizations that raise funds to support or provide services in the following areas: disease or disorder control or elimination; blood banks; mental-health care; free clinics; reproductive-healthcare facilities (including obstetric and gynecologic clinics); family planning centers; prenatal care; rehabilitative medical services; physical-therapy services (including pet-therapy organizations); speech and hearing centers; emergency medical transport (EMT) services; home healthcare (including visiting-nurse associations and similar organizations that provide nursing care and related health services to homebound patients who might otherwise require care in an institution); hospices; organizations involved with alcohol, drug, or substance abuse or dependency prevention and treatment; suicide prevention; organizations involved with addictive disorders; counseling and support groups; and multipurpose organizations that provide a broad range of services to individuals or families, such as the Salvation Army, the American Red Cross, Catholic Charities, United Way, and Make-A-Wish Foundation.

**II. Education**  
 Educational associations supported by the Partnership for Giving are those that are fully accredited by nationally recognized accrediting agencies, or by state departments of education. These include:

- Primary schools
- Secondary schools
- College preparatory schools
- Technical institutions
- Two-year junior and community colleges

- Colleges and universities
- Professional and graduate schools
- National, regional, or state associations of educational institutions, such as the United Negro College Fund and the Independent College Funds of America, whose sole purpose is to raise funds on behalf of its members

**III. Arts and Culture**  
 The Partnership for Giving supports organizations and activities that promote, produce, or support works, discussions, or appreciation related to the humanities (literature, art, music, history, and philosophy). This also includes organizations that contribute to an aesthetic quest for knowledge (science and philosophy) through the human interpretation of and speculation on the surrounding environment. Arts and culture includes, but is not limited to, botanical gardens; ethnic awareness; folk and traditional arts; arts education/schools of art (schools and organizations that promote education in a variety of artistic disciplines, including performing arts schools); arts councils/agencies (organizations that provide funding, management, and programming services for a variety of art agencies in a specific geographic locale); architecture centers; opera companies; symphony orchestras; singing or choral groups; ballet companies; dance organizations; music (can include organizations that are considered groups, bands, or ensembles); performing arts (activities or actual performing arts centers); and theaters and theater groups. Also included are humanities organizations (organizations that promote the study, teaching, or appreciation of the humanities, such as archaeology, art history, modern and classical languages, philosophy, and ethics). Arts and culture may also include historical societies, activities, or preservation centers; genealogical activities and organizations; publishing activities; cultural exchanges with other countries; radio stations that are not members of the Public Broadcasting Service (PBS); PBS (includes National Public Radio [NPR] and Corporation for Public Broadcasting [CPB] stations); museums (includes science museums, planetariums, and hobby museums); libraries; and zoos.

**IV. Animal Welfare**  
 Organizations addressing the welfare of animals. Animal welfare organizations that conduct significant lobbying and/or litigation activities are ineligible.

**V. Environmental Organizations**  
 Nonprofit environmental and conservation organizations primarily focused on activities that are open to and operated for the benefit of the general public (for example, Nature Conservancy and World Wildlife Fund). Environmental organizations that conduct significant lobbying and/or litigation activities are ineligible.

**What do the terms 501(c)(3), 509(a), and 170(c)(1) mean?**  
 The terms 501(c)(3), 509(a), and 170(c)(1) refer to sections of the Federal Tax Code that establish the criteria for tax-exempt charitable organizations. An organization must have 501(c)(3), 509(a), or 170(c)(1) status (be tax exempt) to receive matching funds through the Merck Partnership for Giving.

**\*Note: Not all 501(c)(3) organizations qualify for the program.**

**What gifts will not be matched by the Foundation?**  
 Payments such as the following are not eligible for matching funds by the Foundation:

- Bequests and deferred giving plans
- Combined gifts from a group of people represented as one gift from an eligible donor
- Dues payable to alumni groups or subscription fees for publications
- Gifts of real estate or other property (except securities)
- Gifts given through a third party or gifts given to an educational institution or hospital as a way of supporting a third-party organization (e.g., athletic, religious, or social organization)
- Gifts intended to fulfill a person's pledges, titles, or other church-related financial commitments
- Gifts to support extracurricular activities such as athletics (including athletic clubs), marching bands, and yearbooks
- Premium payments for insurance with the institution named as a beneficiary
- Payments of tuition or other fees
- Pledges not paid
- Gifts to rifle, civic, or economic development organizations
- Gifts to houses of worship (e.g., churches, synagogues, etc.)

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- Contributions to religious programs or organizations whose principal purpose is propagating a particular religious faith, creed, or doctrine (e.g., missions, church planning projects, religious orders, etc.)
- gifts to support capital expenditures

**Is there a minimum or maximum gift amount?**

The minimum gift is \$24 per designated organization. Donations of less than \$24 per organization will not be matched through the Partnership for Giving.

There is no maximum gift total. However, the maximum gift total that will be matched is \$30,000 per eligible donor per calendar year. The Foundation's matching funds are made on an unrestricted basis even though you may designate how you want your personal gift used.

**How is the annual donor limit determined?**

The annual donor limit is determined by the actual date of the donor's contribution to the recipient organization. For example, if you make a donation of \$5,000 on December 31, 2010, to an eligible organization but submit your request for matching funds in January 2011, the matching funds award, if approved, will be charged to your 2010 limit.

**What are the Partnership for Giving program dates?**

The direct giving option is available to eligible donors year-round. The matching funds limit will be tracked on a calendar-year basis (January 1 through December 31).

The payroll deduction option is available to eligible donors only during the payroll deduction enrollment period in the fall of each year. Special reminders and promotion will take place to announce the payroll deduction enrollment period.

**Will I be able to receive benefits for my donation?**

No. Your gift must be a voluntary charitable contribution made from your own personal resources and not from gifts or loans from any other person or organization. As a charitable contribution, your gift cannot be used to pay tuition, membership dues, or subscription fees; it cannot be used as payment in exchange for any kind of benefit received, and it cannot be given because you expect some monetary or other benefit to be given to you or to any other person or organization named by you. In addition, your gift cannot be used for religious or political purposes.

**Is my donation considered pretax or posttax?**  
 Posttax. This means that social security, federal, state, and city taxes have already been withheld from the money you are donating.

**What giving methods are offered through the Partnership for Giving?**

- Cash, check, credit card, or stock are options available for Direct Giving donations.
- A fixed-dollar deduction per pay period is the only option for Payroll Deduction donations.

**Must I obtain a tax receipt?**

Any single donation to a single organization requires a tax receipt from the recipient organization to qualify as a tax deduction.

**How do I obtain a tax receipt for my donation?**

**To claim a tax deduction for any single donation to a single organization, donors must first obtain a tax receipt from the recipient organization. Not all organizations automatically send donors tax receipts. It is the responsibility of donors to follow up with an organization if they have not received a tax receipt. Neither Merck nor the Partnership for Giving can produce tax receipts.**

**Direct Giving FAQs**

**What is direct giving?**

Donors using the direct giving option will make their contributions (cash, check, credit card, or stock) directly to the recipient organization. Donors will then process (online or via paper form) a request for matching funds.

**How do I request matching funds?**

You may request matching funds for *one-time cash, check, credit card, or stock gifts* by using the Partnership for Giving online tool. Requests should be made within 180 days of your contribution. To register your gift using this online tool, please visit the Partnership for Giving website ([www.merckp4g.com](http://www.merckp4g.com)).

You may also request matching funds for *one-time check or stock gifts* using paper matching funds request forms. Either download a form from the Partnership for Giving website ([www.merckp4g.com](http://www.merckp4g.com)) or request that a form be sent to you by calling the Partnership for Giving toll free at 1-866-205-2857.

After verification that your gift has been received by the organization and that the organization qualifies for matching funds, a check will be forwarded to the Partnership for Giving, identifying you as the donor. Matching gifts are processed quarterly. Eligible requests received by the last day of March, June, September, or December are included in the current quarter's payment. Requests that arrive after these dates are processed during the following quarter.

**How does Merck match my stock gift?**

Merck matches the realized value of donated stock in cash. The realized value of the donated stock is calculated using the average trading price on the day of the authorized transfer. The Partnership for Giving vendor, The JK Group, will send matching funds from Merck to the organization after receiving verification of the realized value of the donated stock. (The value of securities, for matching purposes, will be determined by The Merck Company Foundation based on the quoted market value on the date of the gift or a weighted average if the gift is made on a nontrading day.)

**May I donate my Merck stock options?**

No, you may not donate Merck stock options. However, you may donate Merck stock after you exercise your options.

**What are the tax advantages of giving stock?**

You can deduct the full current value of the stock (regardless of purchase price) and avoid the capital gains taxes associated with selling the stock for profit. Therefore, you pay no taxes on the appreciated value of the stock and take the full deduction for the current value of the stock.

**How do I determine the status of my request?**

There are several ways donors can obtain information about their matching funds request and account status:

- Log on to the Internet at [www.merckp4g.com](http://www.merckp4g.com) and click on "Giving History."
- Send an inquiry by e-mail to [merckp4g@easymatch.com](mailto:merckp4g@easymatch.com).
- Call the Partnership for Giving toll free at 1-866-205-2857 and speak to a dedicated Merck Partnership for Giving representative.
- Send a written request to the Merck Partnership for Giving, PO Box 7219, Princeton, NJ 08543-7219.

**Payroll Deduction FAQs**

**May I support eligible organizations using payroll deduction?**

Yes. You may make your contributions through the Partnership for Giving using the payroll deduction option. However, you may only select payroll deduction during the payroll deduction enrollment period, which occurs annually in the fall. During this time only, you may select a **fixed dollar amount per pay period** to be deducted from your paycheck.

**Is a percentage-of-salary payroll deduction available?**

No, the percent payroll deduction is no longer available. You may only request that a **fixed dollar amount per pay period** be deducted from your paycheck.

**How do I use the payroll deduction method?**

Payroll deduction gifts can only be made during the payroll deduction enrollment period in the fall of each year. You may make your payroll deduction pledge using the online pledging tool or by completing and submitting a paper pledge form. To make a payroll deduction pledge online, please visit [www.merckp4g.com](http://www.merckp4g.com).

To use a paper pledge form, either download a form from the Partnership for Giving website ([www.merckp4g.com](http://www.merckp4g.com)) or request that a form be sent to you by calling the Partnership for Giving toll free at 1-866-205-2857. After you have completed the pledge form, you will mail it to Merck Partnership for Giving, PO Box 7219, Princeton, NJ 08543-7219. It must be postmarked by October 15.

If you choose ongoing payroll deduction, your funds will be disbursed to your designated organization(s) on a quarterly schedule beginning in April of the following year. Funds will be sent out approximately eight weeks following the end of a quarter. The Merck matching funds are sent on the same quarterly schedule and are included in the same check. A quarterly disbursement schedule is efficient and reduces the administrative expenses for Merck and the recipient organization(s).

The minimum disbursement threshold is \$100 per organization. At the end of the quarter, if the payroll deduction amount from all donors to an organization is less than \$100, the funds will be held until the accumulated amount reaches the minimum threshold or

until payroll deduction for the pledge year is completed. Setting this minimum reduces administrative expenses for Merck and the recipient organization(s).

**Unclaimed Payroll Deduction Donations**

If the designated qualified organization does not cash the checks it receives through the Partnership for Giving, it will receive three follow-up letters from the Partnership for Giving vendor as a reminder to cash the checks. Follow-up letters will be sent at

90, 120, and 150 days after the original transmittal of the funds by the vendor to the designated organization. After 180 days, if the checks are still not cashed by the organization, the checks will be voided and the employee donations and the Merck matching funds will be sent to the United Way in the community in which the donor lives.

**I don't know if my organization is eligible. What should I do?**

If you do not know if an organization is eligible, please supply the organization name, address, city, state, ZIP code, phone number, and Federal Tax ID number (if available) on the paper pledge form or online. Organizations not currently in the vendor's database will go through an organization validation process to ensure that they meet Partnership for Giving guidelines and IRS requirements. If an organization is eligible, it will be matched. If an organization is ineligible, you will be notified and asked to designate another organization. If the Partnership for Giving vendor, The JK Group, has repeatedly tried to contact you regarding the selection of a new eligible organization and has received no response from you by May 31 of the year following the payroll deduction enrollment period, your contribution will automatically default to the United Way in the community in which you live. For a listing and description of nonprofit organizations in the United States, please visit [www.guidestar.com](http://www.guidestar.com) and use it as a resource. Only those organizations that meet the Merck Partnership for Giving requirements are eligible for matching funds.

**How do I continue my current fixed-dollar-amount payroll deduction?**

Simply do NOTHING and your pledge from last year will automatically roll over (continue as is).

**What happens to my ongoing payroll deduction if I go on an unpaid leave of absence?**

Payroll deductions will cease while you are on leave and will resume after you return. As a result, your annual gift amount will be reduced.

**How do I cancel my current payroll deduction?**

During the payroll deduction enrollment period each fall, you may use the online tool to discontinue your current payroll deduction. Simply visit [www.merckp4g.com](http://www.merckp4g.com).

You may also use the paper pledge form to cancel your payroll deduction. Just check the box that reads, "I wish to discontinue my current payroll deduction." Your payroll deduction will be discontinued as of January of the following year.

If you wish to cancel your payroll deduction after the payroll deduction enrollment period, send an e-mail to [merckp4g@easymatch.com](mailto:merckp4g@easymatch.com). The following details must be included with your request: full name, WIN, and the date of your request. Your request will be processed and your payroll deduction will be discontinued beginning with the next payroll cycle.

**How are my donations and the Merck matching funds disbursed to my designated organizations?**

If you choose to give by ongoing fixed payroll deduction, your funds will be disbursed to your designated organization(s) on a quarterly schedule beginning in April of the following year. Funds will be sent out approximately eight weeks following the end of a quarter. The Merck matching funds are sent on the same quarterly schedule and are included in the same check. A quarterly disbursement schedule is more efficient than a monthly schedule and reduces the administrative expenses for Merck and the recipient organization(s).

The minimum disbursement threshold is \$100 per organization. If, at the end of the quarter, the payroll deduction funds from all donors for an organization total less than \$100, the funds are held until the accumulated amount reaches the minimum threshold or until the payroll deductions for the pledge period are complete. Setting this minimum reduces administrative expenses for Merck and the recipient organization(s).

**What happens when my qualified designated organization does not cash the donation check it receives?**

If the organization to which you have donated does not cash the donation check, the Merck Partnership for Giving vendor will send three follow-up letters to remind the organization to cash the check. The first follow-up letter will be sent after 90 days, the second after 120 days, and the third after 150 days. If, after 180 days, the organization still has not cashed the donation, the check will be voided, and your donation along with the Merck matching funds will be sent to the United Way in the community in which you live.

**Are any administrative fees deducted from my donation or from the Merck matching funds?**

No. Merck pays a separate administrative fee to the Partnership for Giving vendor, The JK Group, to administer the program and provide services.

**When do I receive a confirmation of my Merck Partnership for Giving pledge?**

If you have provided the Partnership for Giving with your e-mail address during the login process, you will receive an e-mail confirming receipt of your online pledge immediately following the pledge submission. In addition, after the payroll deduction enrollment period, you will receive a confirmation of your pledge by regular U.S. mail.

**How can I request a tax receipt?**

You must provide permission to the Merck Partnership for Giving vendor during the payroll deduction pledging process to release your name and address to the designated organization. If you elect to remain anonymous or permit the vendor to release only your name, you cannot request a tax receipt. Once permission is granted, the Partnership for Giving vendor will forward your contact information to your designated organization and request that the organization provide a tax receipt.

**PLEASE NOTE: To claim a tax deduction for any single donation to a single organization, donors must first obtain a tax receipt from the recipient organization. Not all organizations automatically send donors tax receipts. It is the responsibility of donors to follow up with an organization if they have not received a tax receipt. Neither Merck nor the Partnership for Giving can produce tax receipts.**







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