



# The P&G Matching Gift Program Form

## OVERVIEW

P&G will match 1:1 a gift in support of an **academic purpose** at an institution of Higher Education or to any of the qualified Live, Learn and Thrive organizations that meets all of the eligibility requirements detailed in these program guidelines.

## HOW DOES THE PROGRAM WORK?

### ONLINE:

Employees/retirees may request matching gifts through a quick, user-friendly, online request process at The P&G web site <https://www.easymatch.com/pg>.

Following receipt of the request, The P&G program administrator will contact the organization to verify receipt of the employee's gift.

### PAPER:

Employees/retirees may request matching gifts through a paper-form process as follows:

#### Employee/Retiree Instructions

- Complete Part A of the form.
- Mail the completed form and any other necessary documentation to the organization.

#### Organization Instructions

- The organization completes Part B of the form, verifying that the gift was received.
- The form must be signed by an authorized officer of the organization.
- The organization mails the completed form to P&G at P.O. Box 7067, Princeton, NJ 08543-7067.

**P&G Matching Gifts must be requested within the current fiscal year. In order for a gift to be matched, the donor gift must be registered within the fiscal year the gift is made. 7/1 – 6/30. The gift must be registered on-line or the hard copy of the matching gift form must be received no later than June 30 of the current fiscal year. Requests received after the fiscal year is over (6/30) will not be honored. Receipt of gift must be verified by the organization.**

For more information, please visit the program web site at <https://www.easymatch.com/pg>.

The website contains program related information such as Guidelines, FAQs, as well as the ability to view personal giving history and search for charitable organizations.

If you have any questions, please contact P&G via email at [pg@easymatch.com](mailto:pg@easymatch.com) or phone at 1-866-846-8879.

## ADMINISTRATIVE CONDITIONS

P&G reserves the right to interpret, apply, amend or revoke the program and/or the guidelines at any time without prior notice. The policies and procedures described herein are not conditions of employment nor are they intended to create or constitute a contract between P&G and any one or all of its employees.

Organizations approved in the past may not qualify for P&G in subsequent years if new information is received regarding the loss of their tax status, change in their mission or their programs that indicate the organization now falls outside P&G guidelines.

## DONOR ELIGIBILITY

- Regular full-time P&G employees worldwide. There is no continuous service requirement.
- Officially recognized P&G retirees worldwide who were full-time when they retired.
- Current and retired outside directors of P&G

## INSTITUTION ELIGIBILITY

1. A U.S. or Canadian College/University is eligible if:
  - It has 501(c)3 tax-exempt status from the U.S. Internal Revenue Service or the equivalent, or is listed on Canada Revenue.
  - It confers associate, undergraduate, graduate, or professional degrees. If it confers only a degree unrelated to P&G's core business (e.g., theology, war), however, it is not eligible.

- The U.S. College/University is accredited by one of the six regional accrediting associations; select post-graduate Higher Education programs must be accredited by a national accrediting agency recognized by the U.S. Secretary of Education. A Canadian College/University must be operated by the Canadian government.
2. A Higher Education organization (e.g., UNCF, HACU) is eligible if:
  - It has a 501(c)3 tax-exempt status from the U.S. Internal Revenue Service or the equivalent, or is listed on Canada Revenue.
  - Its sole purpose is to raise and transmit tax-deductible gifts directly to an eligible College/University for academic scholarships or other academic needs.
  - Each of its member Colleges/Universities meets all institution eligibility requirements.
3. If a gift is made to any of the following qualified Live, Learn and Thrive organizations, which operate globally but are located in the U.S.
  - P&G Live, Learn and Thrive Fund
  - P&G Children's Safe Drinking Water Fund

## GIFT ELIGIBILITY

- Must be a donation, from the donor's personal funds, which has been paid, and pledged, directly to an approved organization.
- A gift may be paid through a donor's charitable fund.
- The minimum gift eligible for matching is \$25 U.S. or Canadian equivalent. For installment gifts, each match request must be submitted separately and meet the minimum gift requirement.
- The maximum amount matched per donor per fiscal year is \$5,000 U.S. or Canadian equivalent. If the donor makes several contributions, gifts will be matched in the order received, up to the maximum annual donor limit for the July 1 – June 30 fiscal year.
- Gifts must be in the form of cash, check, credit card, donor advised fund, or marketable securities with a quoted market value.
- You may be asked to provide proof of your contribution in the form of a cancelled check, bank statement, credit card statement, or a transfer of stock certificate.
- Gifts of securities are valued based on the "close" price on the date of the gift. No other form of personal or real property will be matched.

## WHAT GIFTS ARE NOT ELIGIBLE FOR MATCHING?

- Gifts made by or through Community Trusts or similar organizations, including Charitable Remainder Trusts, or Family Foundations
- Gifts made in lieu of tuition payment for services
- Subscription, membership or any other fees for which benefits are received
- Dues to alumni(ae) or similar groups
- Gifts or payments for primarily political or religious purposes.
- Insurance premiums; Bequests or life income trust arrangements; or Gifts of real or personal property
- Cumulative gifts from several individuals reported as one contribution
- Non-academic projects or programs (e.g. campus beautification)
- Pre-college institutions (pre-schools, daycare, K-12) and institutions that are not higher education related such as hospitals, radio and television stations, zoos, civic groups, cultural groups, etc.
- Research
- Extracurricular activities, including athletics, travel expenses, a fraternity or sorority, and other clubs or organizations.



# The P&G Matching Gift Program Form

## PART A – DONOR SECTION

**Instructions:** Complete Part A of this form – one for each gift. *Please print or type.* Send the form and a copy of the program guidelines with your contribution to the recipient organization.

DONOR'S STATUS: [ ] Employee [ ] Retiree [ ] Outside Director

EMPLOYEE/RETIREE PERSONNEL ID #

NAME (Last, First, Middle Initial)

HOME ADDRESS

CITY/STATE/ZIP CODE

BUSINESS TELEPHONE, INCLUDING AREA CODE

E-MAIL ADDRESS

EXACT DATE OF GIFT

\$ \_\_\_\_\_ \$ \_\_\_\_\_

AMOUNT OF GIFT (MIN \$25 U.S./CANADIAN EQUIVALENT) AMOUNT TO BE MATCHED (MIN \$25)

TYPE OF GIFT: PLEASE CHECK ONE:

- CASH
- CHECK
- CREDIT CARD
- DONOR ADVISED FUND
- SECURITIES

IF SECURITIES, NUMBER OF SHARES AND NAME OF SECURITY

NAME OF ORGANIZATION

ORGANIZATION CITY, STATE

DESIGNATION/RESTRICTION OR PURPOSE (IF ANY)

I hereby certify that:

- Neither my family nor I will derive any direct or indirect financial or material benefit from this contribution.
- I authorize the above-named recipient organization to report this gift to P&G for the purpose of applying for a matching gift.
- My gift is a voluntary contribution, that it fully complies with the provisions of the program described herein, and does not represent in anyway a fee for a service or benefit.
- Any misrepresentation by me of the statements made herein will forfeit my rights to any matching contributions and, in addition, may result in violations of law.
- I have not been nor will be reimbursed by anyone for this contribution.
- I have read and understood the guidelines of P&G.

SIGNATURE OF EMPLOYEE/RETIREE

DATE

***\*Failure to complete this form will delay processing.***

## PART B – RECIPIENT ORGANIZATION SECTION

**Instructions:** Verify receipt of gift. Complete Part B of this form. *Please print or type.* If this is your first matching gift request to P&G, please enclose a copy of your Internal Revenue Service 501(c)(3) IRS determination letter or the equivalent and a brief description of your organization's primary mission statement or purpose. Forward form to the address printed below.

EMPLOYER IDENTIFICATION NUMBER (EIN)

ORGANIZATION NAME

ADDRESS

CITY/STATE/ZIP/PROVINCE

TELEPHONE, INCLUDING AREA CODE

FAX, INCLUDING AREA CODE

E-MAIL

WEBSITE ADDRESSES (IF ANY)

DATE GIFT RECEIVED

\$ \_\_\_\_\_ \$ \_\_\_\_\_

AMOUNT OF GIFT

TAX DEDUCTIBLE GIFT AMOUNT

I hereby certify that:

- This organization/program meets the eligibility requirements of P&G.
- That neither the donor nor P&G will derive any personal material benefit from this gift or match.
- That this organization is in full compliance with the anti-terrorism laws legislated by the USA PATRIOT Act. In addition, by countersigning this Matching Gift Application, I agree that this organization will not promote or engage in violence, terrorism, bigotry or the destruction of any state, nor will it make sub-grants to any entity that engages in these activities.
- That I am authorized to attest to the above statements and have sufficient knowledge to do so.
- I have read and understood the guidelines of P&G.

AUTHORIZED OFFICER'S NAME (PLEASE PRINT)

TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZED OFFICER

DATE

***\*Completed forms must be received by 6/30 of fiscal year.***

MAIL COMPLETED FORM AND REQUIRED ENCLOSURES TO:

P&G

P.O. Box 7067

Princeton, NJ 08543-7067

Phone: 1-866-846-8879

E-mail: [pg@easymatch.com](mailto:pg@easymatch.com)

[www.easymatch.com/pg](http://www.easymatch.com/pg)