



## THE PROGRAM

The Pfizer Foundation Matching Gifts Program is part of the Foundation's continuing efforts to support non-profit organizations that benefit the communities in which Pfizer employees and retirees live and work. The Program is a voluntary one designed to provide participants with an additional incentive to make periodic contributions benefiting eligible organizations of their own choosing.

## HOW IT WORKS

The Pfizer Foundation will match all eligible gifts of at least **\$25** each but not exceeding \$15,000 in total gifts per person per calendar year made to eligible organizations (or their affiliated funds, foundations or associations). The **\$25** minimum applies to each gift a donor may wish to make; the \$15,000 maximum applies to the total contributions to one or more organizations made by a donor during a calendar year.

Matching Gifts Program application forms must be submitted to the eligible organizations (their affiliated funds, foundations or associations) during the calendar year in which the contribution is made. The recipient organization must then complete and submit the applications to The Pfizer Foundation Matching Gifts Program. Applications must be received by the JK Group no later than **March 1** for contributions made during the prior calendar year.

Contributions may be paid by cash, check, credit card, real estate (a qualified appraisal per IRS rules must be attached) or by negotiable securities that have a publicly listed market value. The value of securities, for the purpose of the Program, will be determined based upon the median market price on the date of the gift. **GIFTS MUST BE PAID, NOT MERELY PLEDGED.**

***Gifts must be charitable contributions which are deductible for federal tax purposes. Please note that neither Pfizer Inc, the employee, retiree, board member, or any member of their family may directly or indirectly benefit as a result of the matching gift.***

## ELIGIBLE INDIVIDUALS

Individuals eligible for the program are US-based regular full-time or regular part-time employees including Puerto Rico, expatriates, retirees or Board members of Pfizer Inc or its wholly-owned subsidiaries, and retirees of Warner Lambert.

## ELIGIBLE ORGANIZATIONS

Any non-profit charitable Health Care, Education, Civic and Cultural organization is eligible for the Matching Gifts Program provided it is located in the United States or Puerto Rico, recognized as tax exempt by the Internal Revenue Service under Section 501(c)(3) of the Internal Revenue Code, and is not a private foundation. Public Schools are also eligible.

## EXAMPLES OF ELIGIBLE ORGANIZATIONS

- Eligible health care organizations include: hospitals, hospices, psychiatric/mental health organizations, ambulatory care facilities, long-term convalescent facilities, etc.; as well as a range of national and local health-related organizations, including those whose programs relate to specific diseases.
- Eligible educational organizations include: graduate and professional schools; colleges and universities; public or private secondary, elementary and pre-elementary schools; as well as a range of national and local education-related organizations.
- Eligible civic organizations include: a wide range of national and local civic and social service groups, such as community

recreational centers, programs for the elderly, halfway houses, women's centers, drug/alcohol rehabilitation projects, youth programs, conservation groups, legal assistance centers, programs for the handicapped, vocational/technical training and non-academic research organizations.

- Eligible cultural organizations include: aquariums, arboretums, art galleries, arts councils, botanical gardens, cultural/performing arts centers, dance companies, film societies, historical societies/restorations, libraries, museums, music/choral groups, opera companies, orchestras, planetariums, public broadcasting television and radio stations, theater companies and zoos.

## RESTRICTIONS & NON-ELIGIBLE GIFTS

The Pfizer Foundation will **NOT** contribute matching funds in these cases:

- Forms received after **March 1** for gifts made in the prior year
  - Gifts to organizations that do not have a 501(c)(3) exemption, except for public schools
  - Private Foundations or trusts
  - Individual, family or group memberships in organizations
  - Gifts to individual research projects
  - Pooled gifts
  - Alumni dues
  - Amounts payable as dues or subscription fees for publications
  - Insurance premium payments
  - Payments that cover the costs of services, tuition, books, student fees
  - Unitrust or charitable remainder organizations
  - In-kind services, materials, supplies or pledges
  - Payments to satisfy legal obligations
  - Gifts to partisan political organizations, candidates, or to support specific legislation
  - Gifts made to anti-business organizations or organizations that practice discrimination
  - Tickets for benefit dinners or events
  - Gifts made by spouses or surviving spouses
  - Gifts made to Donor Advised Funds
  - Gifts made to religious organizations (e.g. churches, temples, synagogues, mosques)
- Gifts may be eligible for a match if the programs operated by faith-based social service organizations meet certain criteria:*
- o The organization has a 501 (c)(3) determination letter from the IRS;
  - o If the gift is designated to a particular program that is available and open to all individuals in the community;
  - o The program is for non-religious purposes (such as a food pantry or domestic abuse shelter) and;
  - o The organization does not use the program to promote any religion.

For more information and an application:

- On the Pfizer Intranet: hrSource and click on Benefit Forms.
- Call the Pfizer Foundation Matching Gifts Program at 888-782-3048 or send an e-mail to [pfiizer@easymatch.com](mailto:pfiizer@easymatch.com).

## ADMINISTRATIVE CONDITIONS

**The Pfizer Foundation will determine whether specific grant requests comply with the eligibility requirements, application procedures and intent of the program. While the Foundation hopes to continue the Matching Gifts Program indefinitely, the Foundation reserves the right to modify or terminate the program at any time.**