



## HERO (Helping Employees Reach Out)

(Return Completed Form to: P.O. Box 8687 Princeton, NJ 08543-8687)

(On-line giving available at <http://www.easymatch.com/shell>)

Telephone: 1-800-554-7861 Fax: 1-609-799-8019 Email: [shell@easymatch.com](mailto:shell@easymatch.com)

### Part 1: Donor Information

First and Last Name: \_\_\_\_\_ Last 4 Social Security #: \_\_\_\_\_ Work Phone: (\_\_\_\_) \_\_\_\_\_

Home Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Donor Type: Employee \_\_\_\_ Director \_\_\_\_ Pensioner \_\_\_\_ Ex-Pat \_\_\_\_

### Part 2: Giving Options

<b>Please only select one option below:</b>		
<input type="radio"/>	<b>Request a Match for a contribution made directly to an eligible charity - Cash/Check/Credit Card or Stock (Minimum \$25.00) – Active Employees and Pensioners</b>	Date of Gift ___/___/___
<input type="radio"/>	<b>On-Going Payroll Deduction (Minimum \$25.00) – Active Employees Only</b> On-going payroll deductions begin in January of the year following the open enrollment period. The end date represents when the deduction will stop. If left blank will continue through the calendar year.	End Date ___/___/___
<input type="radio"/>	<b>One-Time Payroll Deduction (Minimum is \$25.00)-Active Employees Only</b> One-time payroll deductions occur in January of the year following the open enrollment period.	

### Part 3: Charity Information

Please indicate the charity that has received your contribution or will receive your contribution as stated above:

		Employee Amount	Match Amount*
Charity Name: _____ Address: _____ City / State / Zip: _____	EIN # (Optional): _____ Telephone: _____	\$ _____	\$ _____
Charity Name: _____ Address: _____ City / State / Zip: _____	EIN # (Optional): _____ Telephone: _____	\$ _____	\$ _____

If you DO NOT designate your Payroll contribution, 100% of your donation will be directed to your local United Way based upon home zip code. You may designate to any eligible 501(c)(3) non-profit public charity. There is a minimum gift amount of \$25.00 per charity. Please provide as much information on the charity(ies) as possible. Not providing information may cause delays in processing your request. **If you wish to designate to more than 2 charities, please submit an additional HERO form.**\*Under the HERO Open Giving Campaign, regardless of the number of contributions, Shell will provide up to a maximum match of \$5,500 per donor per calendar year. Employees should indicate exact dollars they would like matched for each contribution. Example: Donation A \$50/Match \$50; Donation B \$50.00/Match \$0.

### Part 4: Donor Recognition for a Payroll Contribution (select one option)

Please select one (1) of the donor recognition options listed below.

- Release my name and home address to the charity(ies) I have designated
- Release my name only
- Release my name for certification and my name **should not** be published.

Enter your name as you wish it to be displayed on correspondence to the charity(ies): \_\_\_\_\_

### Part 5: Donor Signature (required)

I request the Shell Oil Company Foundation to make a matching contribution on my behalf. I certify that this gift is solely for the use of the organization or school named and that neither I, nor any member of my family, nor any related third party, nor any party that I designate, will benefit in any way from this gift. I further certify that the amount given is entirely my own and meets the Guidelines for the HERO Program.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Through the HERO program, you may request a direct match or enroll in a payroll contribution during the open enrollment period as specified on the HERO form.

#### ELIGIBLE PARTICIPANTS FOR THE MATCH

- Any full-time or regular part-time employee with Shell Oil Company
- Members and retired members of the Board of Directors of Shell Oil Company
- Pensioners who have retired directly from active service of Shell Oil Company or any other participating company and were immediate pension eligible and receiving overall Shell benefits.
- Ex-Pats (working on assignment in the U.S.)

#### ELIGIBLE ORGANIZATIONS

Nonprofit organizations located in the United States or one of its possessions and recognized by the Internal Revenue Service as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS Code or as an instrumentality of a federal, state or local government as provided by Section 170(c)(1) of the Code.

Eligible organizations include, but are not limited to: colleges and universities, private and public secondary schools (grades 9–12), arts and culture organizations, health and human services agencies, civic organizations, and environmental organizations.

#### WHAT CONTRIBUTIONS ARE ELIGIBLE?

- Must be a donation, from the donor's personal funds, which has been paid, or pledged, directly to an approved organization.
- The minimum gift eligible for matching is \$25. For installment gifts, each match request must be submitted separately and meet the \$25 minimum gift requirement.
- The maximum amount matched per donor per calendar year is \$5,500. If the donor makes several contributions, gifts will be matched in the order received, up to the maximum annual donor limit for the calendar year.
- The donor's limit is based on the date of the gift.
- Gifts must be in the form of check/cash/credit card or marketable securities with a quoted market value made directly to the organization or via one-time and ongoing Payroll pledge for active employees.
- Gifts of securities are valued based on the average of the high and low 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, Donor Advised Funds, or Family Foundations
- Membership fees for which benefits are received
- Gifts or payments for primarily political or religious purposes, unless specified for a community outreach program, such as a soup kitchen or homeless shelter
- Subscription fees for publications
- Bequests or life income trust arrangements
- Gifts of real or personal property
- Forms received more than one year after the date of the gift.
- Payments for which the Donor, their family, or other individuals designated by the Donor receive a direct benefit. Examples include:
  1. Payments for services, tuition, books, or other student fees.
  2. Gifts to fulfill pledges, tithes or other religious-related financial commitments or legal obligations, publication subscription fees, membership dues, or ticket purchases.
  3. Insurance premiums; bequests.
- Gifts must be personal contributions from the Donor's own assets. Gifts are ineligible if the donation includes: gifts from spouses, other family members or contributions made jointly by several individuals.
- Gifts to ineligible organizations. Examples include:
  1. Alumni associations, athletic associations, booster clubs, parent-teacher associations or organizations, etc.
  2. Contributions to individuals, fraternities or sororities.
  3. Gifts given to or through a third party.
  4. Gifts for education/nonscholastic purposes. The gift must support the primary educational mission of the institution. Dinners, events, athletics, athletic scholarships, marching band, stadium construction or maintenance are typical ineligible gifts.
  5. Gifts must be charitable contributions, which can be deducted by the individual for federal income tax purposes, or which are qualified charitable distributions from IRA accounts under § 1201 of the Pension Protection Act of 2006.

#### ADMINISTRATIVE CONDITIONS

Shell 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 above are not conditions of employment nor are they intended to create or constitute a contract between Shell and any one or all of its employees.

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