



# Matching Gifts Program



The  G&E Corporation Foundation provides a way for you

to increase the impact of your personal contribution to schools, scholarship funds, universities, and environmental organizations through the Foundation's Matching Gifts Program. The Foundation strongly believes that investing in these institutions will strengthen the vitality of the communities in which PG&E Corporation employees live and work. By matching employees' contributions, the Foundation hopes to foster and support employee involvement in education and environmental stewardship.

## HOW TO APPLY

### **Employee Instructions**

Read the program guidelines and then complete and sign Section A of this form. If your gift is earmarked for a specific purpose (e.g., Annual Fund, Engineering Department), note this on the "Program designation, if any" line. The Foundation's matching amount will be designated for the same purpose consistent with the program guidelines below. Mail the completed original form with your check to the school, university, scholarship fund, or environmental organization of your choice. If you have already made an eligible gift, complete and sign Section A and send the form to the school, university, scholarship fund, or environmental organization.

### **Instructions for Schools, Universities, or Environmental Organizations**

Read the program guidelines and then complete and sign Section B of the form. Completing and signing the form certifies that you have read the guidelines, that you are a qualified organization, and that this is a qualified gift. Mail all forms to the address shown at the bottom of the form.

### **What Happens Next?**

After verifying that your contribution qualifies for matching, the Foundation will send a check to the school, university, scholarship fund, or environmental organization you have designated. Gifts are matched quarterly with payment made in the quarter following that in which the Foundation receives your properly completed form from the school, university, scholarship fund, or environmental organization. The Foundation will send you an acknowledgment of the gifts made on your behalf at the end of the year.

## PROGRAM GUIDELINES

### **Who Is Eligible?**

Any current full-time or part-time employee, or retiree of PG&E Corporation or Pacific Gas and Electric Company.

### **Which Schools and Universities Are Eligible?**

The PG&E Corporation Foundation will match contributions for educational purposes to accredited, degree-granting, private or public educational institutions in the United States that offer an academic curriculum, including: elementary schools, middle and junior high schools, high schools (kindergarten through 12th grade), colleges, universities, graduate and professional schools, and technical institutions. The Foundation will also match gifts to parent-teacher associations, foundations affiliated with a qualifying school, and targeted, PG&E-approved scholarship funds. All institutions must have 501(c)(3) public charity status with the I.R.S. or be a government agency (e.g., a public school).

### **Which Environmental Organizations Are Eligible?**

The PG&E Corporation Foundation will match contributions to environmental organizations that have 501(c)(3) public charity status with the I.R.S. and are located in the United States. Eligible organizations include those whose primary mission is the conservation and preservation of the environment and wildlife. These organizations must be open to and operated for the general public and willing to submit a statement of purpose if requested by the Foundation.

### **Program Policies**

The PG&E Corporation Foundation will match eligible gifts on a dollar-for-dollar basis. The minimum eligible gift is \$25; the maximum is a total of \$2,500 per calendar year per employee, and \$1,000 per calendar year per retiree.

The Foundation will match gifts made in cash, by check, or by credit card.

Gifts must be made by the employee to the qualified school, university, scholarship fund, or environmental organization, not merely pledged, and must support the organization's primary mission.

Gifts must be charitable contributions that are deductible for federal income tax purposes.

The interpretation, application, and administration of this program will be determined solely by the Foundation, and its decisions shall be final. The program may be suspended, changed, revoked, or terminated at any time without notice.

The budget that the Foundation sets aside each year for the Matching Gifts Program accommodates a high level of participation. However, forms received will be processed on a first-come, first-served basis each calendar year until that current year's Matching Gift budget is exhausted.

Completed forms must be received by January 31 of the year following the gift date to be eligible.

### **What Gifts Are Not Eligible?**

- Gifts to individuals, individuals' projects, alumni groups, fraternities or sororities, auctions, raffles, or advertisements.
- Tuition payments, student fees, subscriptions, insurance premiums, or membership dues.
- Gifts that generate a benefit (e.g., admission to sporting or special events for the employee).
- Gifts to educational programs at non-academic institutions such as libraries, music conservatories, art institutes, or other non-profit organizations.
- Gifts to preschools.
- Gifts to schools, universities, scholarship funds, or environmental organizations outside the United States of America.
- Gifts to institutions that do not meet The PG&E Corporation Foundation's policy on non-discrimination.
- Gifts to organizations that engage in illegal activities.
- Gifts to organizations classified as private foundations under Section 509(a).

## CONTACT INFORMATION

The administration of the program is performed by a firm in New Jersey specializing in matching gifts. If you have any questions about The PG&E Corporation Foundation Matching Gifts Program or would like more forms, please contact:

Toll Free: 1-(888) 973-GIFT (4438)

Fax: 1-(609) 799-8019

pgcorpfdn@easymatch.com

Mailing Address: The PG&E Corporation Foundation  
Matching Gifts Program  
P. O. Box 7586, Princeton, NJ 08543-7586

**The PG&E Corporation Foundation**



**SECTION A**

(To be completed by employee)

Personnel # XXXXXX \_\_\_\_\_ (last four digits only)

Employee Name \_\_\_\_\_

Home Address \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

Country \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_

Employer (Company Name) \_\_\_\_\_

Employer Address \_\_\_\_\_

Work Phone ( ) \_\_\_\_\_

E-Mail Address \_\_\_\_\_

Date of Gift \_\_\_\_\_

Gift Amount \$\_\_\_\_.\_\_\_\_.\_\_\_\_

Name of school, university, scholarship fund, or environmental organization you are sending your gift to \_\_\_\_\_

Program designation, if any (e.g., Annual Fund) \_\_\_\_\_

City, State \_\_\_\_\_  
(you do not need to list street address)

I request The PG&E Corporation Foundation to make a matching contribution on my behalf. I have read the guidelines and believe this to be a qualified contribution under The PG&E Corporation Foundation Matching Gifts Program requirements.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Employee: Please send your check and this form to the school, university, scholarship fund, or environmental organization of your choice. The school, university, or environmental organization sends the form to us.

**SECTION B**

(To be completed by school, university, scholarship fund, or environmental organization. Completed forms must be received by January 31 of the year following the gift date to be eligible.)

Federal Tax Number (EIN number) \_\_\_\_ - \_\_\_\_\_

School, University, Scholarship Fund, or Environmental Organization Name \_\_\_\_\_

(Checks will be made payable to this school, university, scholarship fund, or environmental organization.)

Received a gift of \$\_\_\_\_.\_\_\_\_.\_\_\_\_

From \_\_\_\_\_

Tax Deductible Amount of gift \$\_\_\_\_.\_\_\_\_.\_\_\_\_

School, University, Scholarship Fund, or Environmental Organization Address \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

Telephone ( ) \_\_\_\_\_

Fax ( ) \_\_\_\_\_

I have read the guidelines for The PG&E Corporation Foundation Matching Gifts Program. By signing and presenting this form, I certify that:

- (1) I have read and understand the guidelines.
- (2) This is a qualifying educational institution, scholarship fund, or environmental organization.
- (3) The gift has been received and accepted and meets all the requirements listed in the guidelines.
- (4) Gifts to the school, university, scholarship fund, or environmental organization are tax deductible, and The PG&E Corporation Foundation has not received nor expects to receive any benefit or quid pro quo for its contributions.

Please check one of the following:

- The school, scholarship fund, or environmental organization holds 501(c)(3) status. First-time applicants must submit 501(c)(3) letter or submit an advanced ruling letter from the I.R.S.
- The school is a government agency (e.g., public school) and does not need 501(c)(3) status. First-time applicants must submit a statement of exemption on the exempt agency's letterhead.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Print Name \_\_\_\_\_

Title \_\_\_\_\_

School, University, Scholarship Fund, or Environmental Organization:

Please return form to: The PG&E Corporation Foundation  
Matching Gifts Program  
P. O. Box 7586, Princeton, NJ 08543-7586  
Toll Free: 1-(888) 973-GIFT (4438)

**The PG&E Corporation Foundation**

