

Matching Gifts

Pfizer Foundation Matching Gifts Program

Address: Pfizer Foundation Matching Gifts Program, 6505 W Park Blvd, Ste. 306 PMB300, Plano TX 75093

Questions? Call 866-751-6031 or Pfizer-support@yourcause.com

INSTRUCTIONS

To request a match via paper form, please complete the information below. Then mail this form along with a copy of your receipt to the address above. If you do not include a copy of your receipt, your match will not be processed. The nonprofit organization no longer needs to complete any part of the matching gifts form.

SECTION 1: DONOR INFORMATION

Name of Donor:

Employee Identification Number (EMPID#):

Donor Type:

Colleague

Retiree

Board

Email Address:

Phone Number:

Street Address:

City:

State:

Zip Code:

SECTION 2: DONATION INFORMATION

Name of Recipient Nonprofit Organization:

Organization Identification Number (EIN/TAX ID#):

Donation Designation (if applicable):

Street Address:

City:

State:

Zip Code:

Website:

Donation Amount (Gifts will be matched at 50% for retirees up to \$5,000): \$

Donation Date:

Requested Match Amount: \$

Donation Type:

Check/Cash

Credit Card

Securities

SECTION 3: MATCH AFFIRMATION STATEMENT

I hereby certify that the above donation is entirely my personal contribution, and that it is not in whole or in part the gift of another individual, the sum of the gifts of other individuals, or the gift of any group or organization. I also certify that this gift is solely for the use of the organization named and that neither I, nor any member of my family, nor any related third party, will receive any direct or tangible benefit from this gift. I also certify that I've read and complied with the program guidelines.

Donor Signature: X

Date:

Pfizer Foundation Matching Gift Guidelines

PROGRAM OVERVIEW

The Pfizer Foundation Matching Gifts program matches U.S. based colleagues, retirees and Pfizer Inc Board members donations to eligible 501(c)(3) tax-exempt organization that meets program criteria. The program is a voluntary one designed to provide participants with an incentive to make periodic contributions benefiting eligible organizations that are important to them.

HOW IT WORKS

The Pfizer Foundation will match active Pfizer colleague gifts of at least \$25 each, but up to \$15,000 in total gifts, per person per calendar year made. Retiree donations will be matched at 50% up to a maximum of \$5,000 per calendar year. The minimum applies to each gift a donor may wish to make; the maximum applies to the total contributions to one or more organizations the Foundation will match.

Matching Gifts Program application forms must be received by the processing center no later than **March 1st** for contributions made during the prior calendar year.

Contributions may be paid by check, credit card, 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.**

Please note that neither Pfizer Inc, the employee, retiree, board member, nor 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 those based in Puerto Rico, expatriates, Board members of Pfizer Inc, and retirees.

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.

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** match the following:

- Forms are 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, Donor Advised Fund, Supporting or Religious Organizations (e.g. churches, temples, synagogues, mosques)
- Individual, family or group memberships in organizations
- Gifts to individual research projects
- Pooled funds from a number of individuals
- Amount payable as dues or subscription fees for publications
- Insurance premium payments
- Payments that cover the costs of services, tuition, books, student fees or alumni dues
- Unitrust or charitable remainder organizations
- In-kind services, materials, supplies, pledges or real estate
- Payments to satisfy legal obligations
- Gifts to partisan political organizations, candidates, or to support specific legislation
- Gifts made to organizations that practice discrimination
- Tickets for benefit dinners or events
- Gifts made by spouses or surviving spouses
- 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 the following criteria:

- The organization has a 501 (c)(3) determination letter from the IRS;
- If the gift is designated to a particular program that is available and open to all individuals in the community;
- The program is for non-religious purposes (such as a food pantry or domestic abuse shelter) and:
- The organization does not use the program to promote any religion

For more information including online application, program guidelines and giving history:

- Portal link <http://pfizer.yourcause.com>. Retirees may also access forms, guidelines and frequently asked questions at <http://Pfizerplus.com>
- **Questions?** Call 866-751-6031 or email Pfizer-support@YourCause.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.