

# The Chevron Matching Gift Program

The Chevron Matching Gift Program supports employees, retirees and directors in their commitment to building better communities. This program encourages participants to make contributions by matching their gifts to eligible institutions/organizations in these categories:

- Higher Education
- Pre-College/Kindergarten through 12th Grade
- Arts and Cultural Organizations

Participation in the program is completely voluntary.

## Eligible Participants

- Regular full-time or part-time employees on a U.S. payroll who have at least six months of service with Chevron or any wholly owned subsidiary.
- Former employees considered to be “eligible retirees” by the Retiree Benefits Services Group.
- Current and retired members of the board of directors of Chevron Corporation.

## Program Limits

- Full-time employees and directors will be matched at a maximum of \$5,000 per person per calendar year.
- Part-time employees receiving benefits will be matched at a maximum of \$2,500 per person per calendar year.
- Retirees and retired directors will be matched at a maximum of \$1,000 per person per calendar year.
- Within your total allotment per calendar year, gifts to K–12 schools and to arts and cultural organizations will be matched up to \$500 per category. Higher education is not held to the \$500 limit.

## Eligible Gifts

All gifts will be matched one-for-one. The minimum gift is \$25. Gifts must be personal contributions in the form of cash (personal check or credit card) or marketable securities. Gifts of securities must transfer full ownership rights to the institutions and have a reliable market quotation available to determine value. Securities will be matched by using the average of the high and low stock prices on the date of the gift.

## Eligible Institutions

To be eligible, an institution must be categorized in one of the areas described below, be located in the United States or one of its possessions, and be 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 state or local government as provided by Section 170(c)(1) of the Code. Canadian organizations must be registered charities by the Canadian government.

### Educational Gifts — Higher Education or Pre-College

- Accredited degree-granting graduate and professional schools and four-year and two-year colleges and universities in the United States or Canada.
- Public and private pre-college schools. Elementary and secondary (K–12) schools must be accredited by one of the six regional accrediting agencies, by the appropriate state Department of Education, or by other acknowledged accrediting agencies.
- Foundations established by the school district to fund one or more eligible schools.

*Designated gifts must be made directly through the eligible educational institution. Chevron cannot ensure that designations are distributed in the manner requested. Participants should check with institutions on their funding distribution policy.*

## Arts and Cultural Gifts

Eligible arts and cultural organizations are open to and operated for the benefit of the general public. They must be nonsectarian, nonpolitical and open to full nondiscriminatory public participation. Each nonprofit group must provide its charitable tax identification number.

Arts and cultural organizations are defined as those that promote, produce or offer access to a variety of arts experiences encompassing the visual, media and performing arts. These include: performing arts groups such as orchestras, theaters, and music, opera and dance companies; public libraries; museums of art, history or science; zoos and botanical gardens; public radio and television stations listed in the Corporation for Public Broadcasting Directory; arts funds or councils; and historical societies and historical preservation organizations.

## Ineligible Participants

- Spouses and surviving spouses
- Foundations or charitable trusts controlled by employees, retirees or directors
- Employees and retirees of non-wholly owned subsidiaries

## Ineligible gifts include, but are not limited to:

- Requests submitted one or more years after the donor's gift date
- Multiyear commitments or pledges for future payment, unless pledge was paid in full during a single calendar year
- Nonscholastic collegiate programs or activities, such as athletic scholarships, athletic facilities, special events, or tickets for athletic, cultural or other events
- Fraternities, sororities or booster clubs
- Insurance payment premiums
- Payments in lieu of tuition, books or student fees
- Gifts to churches and other religious organizations or gifts intended to fulfill a church-related financial obligation (e.g., tithing, Bishop's Appeal)
- Bequests
- Deferred gifts or group gifts (e.g., pooled income funds, life income plans, charitable remainder unitrusts, annuity trusts, or pooled funds raised through event sponsorships such as walk-a-thons, etc.)
- Gifts made through third parties, trusts, donor-advised funds, community foundations, etc.
- In-kind services, materials or supplies
- Gifts of real or personal property (other than cash or securities)
- Gifts for which the donor, donor's family or other specified individual receives direct personal benefit



**Administrative Conditions**

The Matching Gift Program is administered by Chevron's Contributions Staff. The company will not provide names of eligible individuals or organizations to outside groups. Interpretation of each application shall be made by Chevron, and all decisions regarding match eligibility are final. No obligation is imposed upon or accepted by Chevron by reason of this application. Chevron reserves the right to suspend, amend, revoke, modify or terminate, in whole or part, this program at any time. Chevron reserves the right to audit institutions'/organizations' records and documents pertaining to this program. If a Matching Gift is at any time found to have been generated by an ineligible gift, Chevron will expect the return of its gift from the recipient institution/organization. After review and authorization, payments are made in the order in which applications are received and may be subject to calendar-year budgetary limitations.

**Information**

Application forms may be obtained on Chevron's intranet at [www-corp.chevron.com/pa/contributions/matchinggifts.htm](http://www-corp.chevron.com/pa/contributions/matchinggifts.htm)

Questions should be directed to:

Chevron Matching Gift Program  
PO Box 2160  
Princeton, NJ 08543-2160

Telephone: 1-877-202-2374

Fax: 1-609-799-8019

Email: [chevron@easymatch.com](mailto:chevron@easymatch.com)

**Section A**

Donor should complete Section A. Send the original signed, completed form to the eligible institution/organization. Please print or type. Enclosed is my personal gift:

Gift Amount \$ \_\_\_\_\_ to \_\_\_\_\_  
Personal Check/Credit Card or Securities Only

Name of Recipient Institution/Organization \_\_\_\_\_

Located in \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

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

Form of Gift:  Personal Check/Credit Card  
 Securities No. of Shares \_\_\_\_\_  
Gift Amount \_\_\_\_\_

Name of Security and Stock Symbol \_\_\_\_\_

I prefer that my eligible gift be designated for \_\_\_\_\_  
(if other than unrestricted)

I wish the amount of \$ \_\_\_\_\_ to be matched by Chevron. (Fill in only if different from above)

**I certify that the gift described above is a personal contribution that has been made voluntarily and that my gift fully complies with the provisions set forth on the reverse side of this application. I also certify that my gift does not directly benefit me, members of my family or any other person(s) designated by me.**

Signature of Donor \_\_\_\_\_ Date Signed \_\_\_\_\_

Donor Status:  Full-time Employee  Director  
 Part-time Employee  Retiree

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_

Social Security No. \_\_\_\_\_

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

City/State/ZIP \_\_\_\_\_

Company/Department \_\_\_\_\_

Daytime Telephone \_\_\_\_\_ Email Address \_\_\_\_\_

**Section B**

Eligible institutions/organizations must complete Section B verifying the gift received. If this is your first time requesting a Matching Gift from Chevron, please include a copy of your tax-exempt letter showing 501(c)(3) status from the IRS and a profile for arts and cultural organizations or proof of accreditation for educational institutions. Send the completed form to: **Chevron Matching Gift Program, PO Box 2160, Princeton, NJ 08543-2160.** (Please print or type.)

**In anticipation of receiving Chevron's gift matching the individual's gift acknowledged, I hereby certify that no goods or services have been or will be provided to Chevron in consideration of its Matching Gift. Further, I hereby certify that this gift, made by the individual named in Section A, was given without promise or material benefits to the donor or person(s) designated by the donor and otherwise fully complies with program provisions stated on the reverse side of this application. I understand the value of tickets will not be matched. I verify that the gift described in Section A will be applied solely to the charitable activities of the organization.**

Category:  Higher Education  Arts/Cultural  Pre-College

I hereby certify that a gift of \$ \_\_\_\_\_ of which \$ \_\_\_\_\_

is tax deductible or \_\_\_\_\_ shares of \_\_\_\_\_

was received on \_\_\_\_\_ by \_\_\_\_\_

Name of Institution/Organization \_\_\_\_\_

Address \_\_\_\_\_

City/State/ZIP \_\_\_\_\_

Telephone No. \_\_\_\_\_

Fax \_\_\_\_\_ Email Address \_\_\_\_\_

Web Site Address \_\_\_\_\_

Federal Tax Identification Number (required) \_\_\_\_\_

Signature of Authorized Financial Officer \_\_\_\_\_

Name (please print) \_\_\_\_\_

Title \_\_\_\_\_ Date Signed \_\_\_\_\_

**Processing will be delayed if this form is not completed and signed.**

