



Matching Gifts Guidelines

Charter Oak Federal Credit Union is committed to giving back to charitable entities within its field of membership, as well as charities elsewhere that are meaningful to its members. The credit union will match member donations of at least \$25 and up to \$500. Together we can strengthen our communities!*

ELIGIBILITY

- Eligible organizations must be located within the United States, and recognized as tax exempt by the Internal Revenue Service under Section 501(c)(3) of the Internal Revenue Code. Eligible organizations include, but are not limited to, health and human service agencies; civic, cultural, educational and health care organizations.
- The donor must be a primary member of Charter Oak Federal Credit Union.
- Up to \$500 will be matched per primary member between Monday, August 14, 2017 and Wednesday, November 22, 2017.

RESTRICTIONS

- Examples of ineligible organizations include: private foundations; fraternal, political and religious groups; organizations that are not open to the general public; and individuals.
- Your donation must be made between Monday, August 14, 2017 and Wednesday, November 22, 2017.
- **MATCHING GIFTS REQUEST FORMS** must be submitted to the eligible organizations by Wednesday, November 22, 2017. The recipient organization must then complete and send the application to Charter Oak Federal Credit Union. Applications must be received by Wednesday, January 31, 2018 for contributions made during the prior calendar year from the charity to be eligible for the match.
- Pooled funds from a number of individuals and payments to satisfy legal obligations will not be matched.
- Payroll deductions are not eligible and will not be matched.

ADMINISTRATIVE CONDITIONS

Charter Oak Federal Credit Union reserves the right to deny any request, and can modify or terminate the program at any time. Submission of an application is NOT a guarantee of a match. Charter Oak Federal Credit Union is not responsible to match the donation if the charity does not properly comply with the terms mentioned above. Matching contributions that are paid by Charter Oak Federal Credit Union are exclusively owned by Charter Oak Federal Credit Union and do not qualify as a tax deduction for the participants of the program. Consult your tax advisor for the deductibility of your personal contribution for Federal and State income tax purposes. Program is only valid for Charter Oak Federal Credit Union Members.

**Donations must be made in \$25 increments to be matched. For example: \$25, \$50, \$75, and \$100.*

CONTACT INFORMATION

Phone

860.446.3238

Email

MatchingGifts@cofcu.com

INSTRUCTIONS

For the member...

1. Review the guidelines.
2. Select a 501(c)(3) charity.
3. Make a donation and complete the Matching Gifts Request form. Send the donation and the form to the charity.

For the 501(c)(3) charity...

1. Review the guidelines.
2. Using the Matching Gifts Request Form, complete the eSubmission form. You may submit up to five requests at a time. (<https://charteroak.org/content/matching-gifts-charity-form/>)
3. Mail original Matching Gifts Request forms to:
Charter Oak Federal Credit Union
MGP – Original Copy
1055 Hartford Turnpike
Waterford, CT 06385