

# Matching Gifts Program

Charitable organizations around the globe that have special meaning to you may be eligible to receive support through the PepsiCo Foundation Matching Gifts Program. Available to employees worldwide, this program will match your personal donations to eligible nonprofit agencies, leveraging and increasing the impact of your contributions.

## Eligible Participants

- Active full and part-time employees; retirees, their spouses and surviving spouses; domestic partners.
- Current and retired PepsiCo Board of Directors, spouses and surviving spouses; domestic partners.
- Advisory Board members.

## Eligible Organizations

Nonprofit agencies recognized by the IRS as tax-exempt and designated a public charity under Section 501(c)(3) of the IRS Code or as an instrument of a federal, state or local government as provided by Section 170(c)(1) of the Code. Organizations based outside the U.S. must carry U.S. tax equivalency in order to qualify and participate in the program.

Eligible organizations include, but are not limited to: colleges and universities, private and public elementary and secondary schools, arts organizations, health and human services agencies, civic groups, and environmental entities.

## What Contributions are Eligible?

- Donations, from the donor's personal funds, which have been paid 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 \$10,000. 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, credit card, or marketable securities with a quoted market value.
- Gifts of securities are valued based on the adjusting closing price of the gift. No other form of personal or real property will be matched.
- You may be asked to provide proof of your contribution in the form of a canceled check, bank statement, credit card statement, or a transfer of stock certificate.

## What Gifts are Not Eligible for Matching?

- Gifts pooled/collected from several donors that are reported as one contribution.
- Gifts made in lieu of tuition or payment for services.
- Subscriptions, memberships or any other fees for which benefits are received.
- Dues to alumni (ae) or similar groups.
- Gifts for political causes.
- Gifts or payments for religious purposes, unless specified for a community outreach program, such as a soup kitchen or homeless shelter.
- Insurance premiums.
- Bequests or life income trust arrangements.
- Gifts of real or personal property.
- Unpaid pledges.

## How Does the Program Work?

### Online:

Donors with a Global ID may request matching gifts through an online request process at the PepsiCo Foundation Matching Gifts Program web site at <http://www.easymatch.com/pepsico>

Following receipt of the request, the PepsiCo Foundation's program administrator will contact the organization to verify receipt of the employee's gift.

### Paper:

Donor may request matching gifts forms by calling 1-866-321-6391.

### Donor Instructions

- Complete Part 1 of the form and mail along any other necessary documentation to the organization.

### Organization Instructions

- Complete and sign Part 2 of the form, verifying that the gift was received. The form must be signed by an authorized officer of the organization.
- Mail the completed form to the PepsiCo Foundation Matching Gifts Program at P.O. Box 7635, Princeton, NJ 08543- 7635.

Eligible requests are processed on the following quarterly schedule.

Received By:	2/1	5/1	8/1	11/1
Processed By:	2/28	5/31	8/30	11/30

Matching Gifts must be requested within 6 months of the gift date. Requests received after that time will not be honored. PepsiCo Foundation matches are designated for unrestricted support, unless designated by donor.

For more information, please visit the program web site at <http://www.easymatch.com/pepsico>

The website contains program-related information such as Guidelines and FAQs. Donors will have the ability to view their personal giving history beginning with their 2009 donations.

If you have any questions, please contact the PepsiCo Foundation Matching Gifts Program via email at [pepsico@easymatch.com](mailto:pepsico@easymatch.com) or by phone at 1-866-321-6391.

## Employee Service/Double Match Eligibility

If a donor actively volunteers with an eligible organization, their personal contributions may qualify for a double match. To receive the 2:1 match, donors must complete 50 hours of service during a calendar year.

Donors must apply for the double match at the time they submit their matching gift request. Once a request is submitted, it cannot be altered.

## Administrative Conditions

PepsiCo Foundation 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 PepsiCo Foundation and any one or all of its employees.

Organizations approved in the past may not qualify for the PepsiCo Foundation Matching Gifts Program in subsequent years if new information is received regarding its program eligibility. Any misrepresentation by donors will forfeit their rights to utilize the PepsiCo Foundation Matching Gifts Program.



# PEPSICO FOUNDATION

## Matching Gifts Application

### PART 1 – DONOR SECTION

**Instructions:** Complete Part 1 of this form and mail with your donation to the charitable organization.

DONOR GLOBAL ID NUMBER

DONOR NAME

HOME ADDRESS

CITY/STATE/ZIP

PEPSICO DIVISION / OFFICE LOCATION

BUSINESS TELEPHONE, INCLUDING AREA CODE

E-MAIL ADDRESS

EXACT DATE OF GIFT VOLUNTEER/BOARD MEMBER ANNUAL HOURS OF SVC.

\$ \$ AMOUNT OF GIFT (MIN \$25) AMOUNT TO BE MATCHED (MIN \$25)

SPECIFIC PURPOSE OF GIFT (IF ANY)

TYPE OF GIFT: PLEASE CHECK ONE:

CHECK/CREDIT CARD  SECURITIES

IF SECURITIES, NUMBER OF SHARES AND NAME OF SECURITY

NAME OF ORGANIZATION

ORGANIZATION CITY, STATE

I hereby certify that:

- Neither my family nor I will derive any direct or indirect financial or material benefit from this contribution.
- I authorize the above-named recipient organization to report this gift to the PepsiCo Foundation for the purpose of applying for a matching gift.
- My gift is a voluntary contribution, that it fully complies with the provisions of the program described herein, and does not represent in any way a fees for services or benefits.
- Any misrepresentation by me of the statements made herein will forfeit my rights to any matching contributions.
- I have not been, nor will be, reimbursed by anyone for this contribution.
- I have read the program guidelines and certify that this request is eligible and made in accordance with published policies.

SIGNATURE OF EMPLOYEE DATE

*\*Failure to complete this form will delay processing. Forms must be received within six (6) months of the date of your donation.*

### PART 2 – RECIPIENT ORGANIZATION SECTION

**Instructions:** Verify receipt of gift. Complete Part 2 of this form. If this is your first matching gift request to the PepsiCo Foundation Matching Gifts Program, please enclose a copy of your Internal Revenue Service 501(c)(3) IRS determination letter or US tax equivalency and a brief description of your organization's primary mission statement or purpose. Forward form and documents to the address printed below.

ORGANIZATION/EMPLOYER IDENTIFICATION NUMBER (EIN)

ORGANIZATION NAME

ADDRESS

CITY/STATE/ZIP

TELEPHONE, INCLUDING AREA CODE FAX, INCLUDING AREA CODE

E-MAIL WEBSITE ADDRESS (IF ANY)

DATE GIFT RECEIVED

\$ \$ AMOUNT OF GIFT TAX DEDUCTIBLE GIFT AMOUNT

I hereby certify that:

- This organization/program meets the eligibility requirements of the PepsiCo Foundation Matching Gifts Program.
- That neither the donor nor PepsiCo Foundation will derive any personal material benefit from this gift or match.
- That this organization is in full compliance with the anti-terrorism laws legislated by the USA Patriot Act. In addition, by countersigning this Matching Gifts Application, I agree that this organization will not promote or engage in violence, terrorism, bigotry or the destruction of any state, nor will it make sub-grants to any entity that engages in these activities.
- I am authorized to attest to the above statements and have sufficient knowledge to do so.
- I have read and understood the guidelines of the PepsiCo Foundation Matching Gifts Program.

AUTHORIZED OFFICER'S NAME (PLEASE PRINT)

TITLE (PLEASE PRINT)

SIGNATURE OF AUTHORIZED OFFICER DATE

MAIL COMPLETED FORM AND REQUIRED ENCLOSURES TO:

PepsiCo Foundation Matching Gifts Program  
P.O. Box 7635  
Princeton, NJ 08543-7635  
Phone: 1-866-321-6391  
Fax: 1-609-799-8019  
E-mail: [pepsico@easymatch.com](mailto:pepsico@easymatch.com)  
Web Site: [www.easymatch.com/pepsico](http://www.easymatch.com/pepsico)