



Matching Gift Program Guidelines

CDK Global acknowledges its corporate, social, and civic responsibilities in many ways. One of the programs offered to associates is the CDK Global Matching Gift Program. This program allows associates to support certain qualified charities and civic organizations of their choice.

Who can participate?

All active full-time and part-time CDK associates in the US and Canada are eligible effective from date of hire. Members of CDK's Board of Directors are also eligible to participate.

What organizations qualify to receive matching funds?

For US associates – Eligible organizations must be located in the United States or one of its territories and be recognized by the Internal Revenue Service as tax-exempt and designated as a public charity under Section 501(c)(3) of the IRS Code and designated as a 'Public Charity' under either Section 509(a)(1) or Section 509(a)(2) of the IRS Code.

For Canadian associates - organizations must be registered as charitable organizations in good standing with the Canada Revenue Agency (CRA). You can check the CRA "Charities Listing" on the CRA website.

What contributions are eligible for matching?

- Gifts must be personal contributions made directly to approved organizations.
- Gifts must be made from the donor's personal funds, which has been paid and not simply pledged. The minimum gift eligible for matching is \$25 USD/CAD. For gifts of installments, each installment must be submitted separately and meet the \$25 minimum gift requirement. The donor's limit is based on the date of the gift.
- The maximum amount matched per donor per fiscal year is \$3,000. If the donor makes several contributions, gifts will be matched in the order of gift date, up to the maximum limit for the fiscal year.
- Gifts must be in the form of cash, check, credit card, or marketable securities with a quoted market value. Gifts of securities are valued based on the average of the high and low on the date of the gift. No other form of personal or real property will be matched.

What is not eligible for matching?

- Gifts that provide a direct benefit to the donor or donor's family.
- Any portion of a gift that is not tax deductible to the donor.
- Gifts from spouses or surviving spouses.
- Gifts made in lieu of or fees for tuition payment or services.
- Membership fees for which benefits are received.
- Dues to alumni(ae) or similar groups.

- Gifts or payments for primarily political or religious purposes, unless specified for a community outreach program, such as a soup kitchen or homeless shelter.
- Subscription fees for publications.
- Insurance premiums.
- Bequests or life income trust arrangements.
- Cumulative gifts from several individuals reported as one contribution.

Matching Gift Process

Matching Gift Forms – A CDK Global Matching Gift Form can be found on the last page of this document. This form should be completed and sent, with the contribution, directly to the designated institution. The institution must verify the amount of the gift and forward the completed form to the CDK Global Corporate Contributions Committee. After determining eligibility, the Committee will authorize payment.

Time Limits – Matching gifts are processed quarterly and sent directly to the recipient institutions. Match requests must be received by the CDK Global Corporate Contributions Committee within six months of the date of payment by check, credit card, or traded securities. Requests received after that time will not be honored.

Administrative Conditions

CDK Global reserves the right to interpret, apply, suspend, change, revoke or terminate the Matching Gift Program or these guidelines at any time without prior notice. Additionally, the CDK Global Corporate Contributions Committee or its designee shall be the sole judge as to the eligibility of donations and potential grantee organizations including whether their missions support CDK Global's mission and values. In all of the foregoing matters, the decisions of CDK Global shall be final.

The Matching Gift Program and the guidelines and procedures described above are not conditions of employment nor are they intended to create or constitute a contract between CDK Global and any one or all of its employees.

CDK GLOBAL

U.S. MATCHING GIFT REQUEST FORM



CDK ASSOCIATE

DIRECTIONS FOR THE CDK ASSOCIATE

1. Prior to completing this form, read the program guidelines to ensure that your donation is eligible to be matched.
2. Fill out ALL applicable boxes below. Incomplete forms will be returned to you.
3. Email or mail the form to the charitable organization.

Associate Name		Employee ID	Name of Charitable Organization	
CDK Office Location		Phone Number	Specific Use/Restriction (if applicable)	
CDK Email Address			Gift Amount (Min. \$25)	Date of Gift

For Gifts of Marketable Securities Only

Full Name of Stock	Stock Symbol	Number of Shares	Approximate Value on Date of Gift
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Signature Required: This gift (and its slated value) is made from my personal funds (not pooled or collected) and is intended to fully qualify as a charitable donation under the Internal Revenue Code of 1986, as amended. I verify that: (i) in return of this gift and any matching gift made by CDK pursuant to this form, neither I nor a member of my family have received or will receive any payment, goods, products, tuition, service, or direct benefit to me; and (ii) I do not intend for any matching gift made by CDK pursuant to this form to improperly influence any act or decision to obtain or retain business, or to secure any improper advantage for CDK with any current or prospective client, vendor, commercial partner or any government or government-owned or controlled entity. By signing this form, I am certifying that the gift meets all of the requirements listed in the guidelines. I agree that my typed signature is an e-signature and is the legal equivalent of my wet signature. I understand that I may revoke my agreement to e-sign this form in the future by sending a written request to myGiving@cdk.com but that future revocations do not impact the e-signature currently being provided below.

Associate Signature (may be typed)	Date
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CHARITABLE ORGANIZATION

DIRECTIONS FOR THE CHARITABLE ORGANIZATION

1. Fill out ALL applicable boxes below. Incomplete forms will be returned to you.
2. To authorize CDK to deposit your match via Electronic Funds Transfer (EFT), fill out the applicable boxes below and enclose a copy of a voided check or deposit slip (unless previously sent with a prior match request).
3. Enclose copies of your W-9 and IRS 501(c)(3) determination letter (unless previously sent with a prior match request).

Legal Name of Charitable Organization		Mailing Street Address	
EIN	Phone Number	City, State, Zip	
Name of Authorizing Officer	Email Address of Authorizing Officer (required)	Gift Amount Received	

For Electronic Funds Transfer Only

(CDK's preferred payment method is EFT. We will issue a check if no EFT information is provided.)

Bank Name	Bank Transit/Routing Number	Bank Account Number
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Signature Required: As of this date, I attest that our charity is a reputable and accredited 501(c)(3) charity in good standing with the IRS. I hereby certify that this matching gift was made by the associate named above whose gift has been received by this organization on the date specified. This gift will not be used to fulfill payment of a pledge, any fees, services, membership dues or in lieu of tuition. I agree that my typed signature is an e-signature and is the legal equivalent of my wet signature. I understand that I may revoke my agreement to e-sign this form in the future by sending a written request to myGiving@cdk.com but that future revocations do not impact the e-signature currently being provided below.

Signature of Authorizing Officer (may be typed)	Date
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DO NOT RETURN WITHOUT THE FOLLOWING DOCUMENTS!

- > W-9
- > IRS 501(c)(3) determination letter
- > For EFT, copy of voided check or deposit slip

MAIL TO: CDK Matching Gift Program
1950 Hassell Road
Hoffman Estates, IL 60619

OR

EMAIL TO: MyGiving@cdk.com