



# Chevron Humankind Direct Giving Match and Volunteer Grant Request Form

Chevron Humankind supports employees, retirees and corporate directors in their commitment to build better communities. We invite you to request a one-to-one match for your financial contributions to any eligible nonprofit and/or to obtain volunteer grants from Chevron Humankind for time you spend volunteering for any eligible nonprofit.

To make a contribution through payroll and request a match, use form GO-1777A, "Chevron Humankind Payroll Giving Match Request Form."

**You should not submit this form if you request a match or volunteer grant online.** You can request a match or volunteer grant online at [www.chevronhumankind.com](http://www.chevronhumankind.com). Match and volunteer grant requests must be submitted to Chevron Humankind by **January 31** of the year after the date of your contribution or accruing volunteer time.

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## Eligible Contribution Choices

**Direct, one-time** (\$20.00 minimum per gift): Contributions must have been made by check or credit card or be in the form of marketable securities. Donors of securities must transfer full ownership rights to recipient organizations. Securities must have a reliable market quotation available to determine value and are matched by using the average of the high and low stock prices on the date of the gift.

**Private "family" foundations and Donor Advised Funds:** Donor Advised Funds must be directly funded by the employee, retiree or director only, and the Fund must maintain a separate account segregating the contributions of the donor. Contributions made by a qualified "family" foundation or Donor Advised Fund must be directed by the donor and made on his or her behalf.

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## Eligible Participants

- All Chevron U.S.-paid employees and Chevron employees who are based in the United States.
- Former employees who retired having met eligibility requirements for retiree medical coverage from Chevron Corporation, a Chevron Corporation acquired company, and/or a Chevron affiliated company.
- Current and retired members of the board of directors of Chevron Corporation.

Spouses and surviving spouses of Chevron employees or retirees and employees and retirees of non-wholly owned subsidiaries of Chevron are not eligible to participate in Chevron Humankind.

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## Contribution Limits

The Chevron Humankind fund is capped at \$17 million. Once the fund has been exhausted during a calendar year, a notice is posted on the Chevron Humankind Web site, and any requests received subsequently are not matched in that year.

Total annual individual caps are as follows:

- Up to \$10,000 per year per employee or director (matching funds and grants combined)
- Up to \$3,000 per year per retiree (matching funds and grants combined)

Volunteer Grant limits are as follows:

- At least 20 hours of volunteer time with one nonprofit organization per year for a \$500 grant, up to two charities
- Or, at least 40 hours of volunteer time with one nonprofit organization per year for a \$1,000 grant.

Volunteer hours accrue January 1 through December 31 and do not roll over year to year. A charitable contribution cannot be made for the value of volunteer services. Chevron Corporation does not provide personal tax advice; please consult a tax professional for information about charitable contributions.

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## Eligible Recipient Organizations

The following organizations may be eligible to receive a match from Chevron Humankind:

- Nonprofit organizations and members of nonprofit groups that are recognized by the U.S. Internal Revenue Service both as tax-exempt under Section 501(c)(3) of the Internal Revenue Code (IRC) and as public charities.

**Note:** Chevron will consider matching gifts to programs operated by faith-based organizations if those programs (a) are open to all individuals in the community regardless of religious belief; (b) serve a secular purpose, such as a food pantry or a homeless shelter; and (c) do not require participants to join in religious worship as a condition of receiving the services that the charity offers.

- Civic organizations (such as a volunteer fire department) recognized by the IRS as tax-exempt under Section 501(c)(4) of the IRC.
- Government entities such as public libraries, publicly owned and operated museums, municipal zoos, public schools, state colleges and universities, and community colleges.

Entities that are not eligible to receive Chevron Humankind matching funds and grants include organizations that violate Chevron's nondiscrimination policy or that represent a conflict of interest with Chevron's business interests.

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## Administrative Conditions

Chevron Corporation will not provide names of eligible individuals or organizations to outside groups. Interpretation of each application shall be made by Chevron Corporation, and all decisions regarding match eligibility are final. No obligation is imposed upon or accepted by Chevron Corporation by reason of any application to the program(s) for funding. Chevron Corporation reserves the right to suspend, amend, revoke, modify or terminate, in whole or part, any program at any time. Chevron Corporation reserves the right to audit institutional/organizations' records and documents pertaining to this program. If an ineligible gift or invalid representation of employee involvement generates an expenditure of Chevron Humankind funds, Chevron Corporation will expect the return of its gift from the recipient institution/organization. After review and authorization, payments are made on a periodic schedule and may be subject to calendar-year budgetary limitations. Funds for Chevron Humankind will be budgeted in the consolidated charitable contribution budget.



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**DIRECT GIVING MATCH** Complete this section to request matching for a donation or gift. Send the original signed, completed form along with a copy of your donation receipt to the address below. If you are unable to provide a copy of your donation receipt, the recipient organization will need to verify receipt of your gift.

Recipient Organization: \_\_\_\_\_ Gift Amount: \$ \_\_\_\_\_  
See "Eligible Recipient Organizations" on previous page. Organization's Tax ID EIN number (Required)  
Mark one:  cash  check  credit

Location: \_\_\_\_\_ \$ to Match: \$ \_\_\_\_\_  
City State

Program: \_\_\_\_\_ Date of Gift: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Within Recipient Organization, if applicable.

To contribute securities, please enter the security name, its stock symbol, and the number of shares and their value (in cash or estimated stock) on the line below:

**VOLUNTEER GRANT** Complete this section to request a volunteer grant for time you spend volunteering. Send the original signed, completed form to the address below.

Recipient Organization: \_\_\_\_\_  
See "Eligible Recipient Organizations" on previous page. Organization's Tax ID EIN number (Required)

Location: \_\_\_\_\_  
City State

Project/Event: \_\_\_\_\_

Project/Event Start Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Total Accrued Volunteer Time:  20+ hours  40+ hours  
 Project Event End Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Hours Submitted for Grant:  20 hours for \$500 grant  40 hours for \$1,000 grant

I certify that the volunteer hours or gift described above are a personal contribution that fully complies with the provisions set forth by Chevron Humankind guidelines. I also certify that my contribution does not directly benefit me, members of my family or any other person(s) designated by me.

\_\_\_\_\_  
 Signature of Donor/Volunteer \_\_\_\_\_  
 Date Signed

Chevron Humankind Unique ID Number (Required) (if you don't know this number, call customer service at the phone number below)

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

\_\_\_\_\_  
 Home Address \_\_\_\_\_  
 City \_\_\_\_\_  
 State \_\_\_\_\_  
 ZIP

\_\_\_\_\_  
 Email Address \_\_\_\_\_  
 Daytime Phone \_\_\_\_\_  
 Company/Department

The recipient organization may acknowledge me as a contributor. Contact me through my  home address  work address  
 Name(s) for acknowledgement: \_\_\_\_\_

I prefer to remain anonymous. Please do not release my name to the charity I have designated.

Send the signed, completed form to the following address. If you need further information, feel free to contact us.

Chevron Humankind Telephone: 1-972-755-3950  
 c/o YourCause M – F, 8:30 a.m. to 6 p.m. (CST)  
 2508 Highlander Way, Suite 210 Email: support@yourcause.com  
 Carrollton, TX, 75006