



## 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.
- Business accounts do not qualify for Matching Gifts donations.
- A primary member can donate up to a total of \$500 to eligible organizations between August 13, 2025 and November 20, 2025 or until our 2025 Matching Gifts funding limit is met.

**Please note:** The \$500 can be donated to one eligible organization or divided between multiple eligible organizations. Donations beyond the \$500 limit per primary member will not be matched.

### RESTRICTIONS

- Examples of ineligible organizations include: private foundations; fraternal, political and religious groups; organizations that are not open to the general public; and individuals.
- 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.
- **MATCHING GIFTS E-FORMS** must be submitted by the eligible organizations to Charter Oak by November 20, 2025 or until our 2025 Matching Gifts funding limit is met.

### 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*

860.446.8085 x3275

#### *Email*

[MatchingGifts@cofcu.com](mailto: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 Member Request form. Send the donation and the form to the charity.

## For the 501(c)(3) Charity...

1. Review the guidelines.
2. Using the information from the Matching Gifts Member Request Form, complete the eSubmission form. You may submit up to five requests at a time.



## Matching Gifts Request Form

*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\* that are made between Wednesday, August 13, 2025, and Thursday, November 20, 2025. All eligible organizations must submit their electronic submission forms by Thursday, November 20, 2025. Together we can strengthen our communities!*

This form is to be completed by the member (donor) and sent directly to the charity along with the donation.

Member's First Name	
Member's Middle Initial	
Member's Last Name	
Suffix	
Address	
City	
State	
Zip	
Phone Number	
Email Address	
Date of Gift	
Donation Amount	

*I hereby certify that the above donation is entirely my personal contribution, and that it is not in whole or in part the gift of another individual, the sum of the gifts of other individuals, or the gift of any group or organization. I also certify that this gift is solely for the use of the organization named and that neither I, nor any member of my family, nor any related third party, will receive any direct or tangible benefit from this gift. I also certify that I've read and complied with the program guidelines.*

Signature	
Date	

**NOTE TO THE CHARITY:** Using this information, 501(c)(3) charities meeting our guidelines should visit [CharterOak.org](http://CharterOak.org)'s Matching Gifts Program page and complete the Charity e-Form form to receive the matching gift. For questions please email: [MatchingGifts@cofcu.com](mailto:MatchingGifts@cofcu.com)

\*Valid on donations up to \$500 made by primary members between 8/13/25 and 11/20/25 or until Matching Gifts funding limit is met. Donations must be made to organizations recognized as tax exempt by the Internal Revenue Service under Section 501(c)(3) of the Internal Revenue Code. Some exclusions apply. 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.