



CHARTER OAK
CREDIT UNION

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's Matching Gifts Program page and complete the Charity e-Form form to receive the matching gift. For questions please email: 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.