



Retiree Charitable Contribution Campaign (RCCC) Application Form
(Donations can be made via Pension Deduction and/or Direct Contributions Options. Select the option that best suits your donation.)

NAME: _____ Serial # _____ Email _____

Enter an 'X' in the box if you are a retired **Executive**.

Instructions for donating via Pension Deduction

- Option A:** Choose this option to initiate or change an existing monthly pension deduction contribution. (If you wish to keep your current ongoing monthly pension deduction the same, no further action is required unless we are advised otherwise.)
- Option B:** Choose this option to initiate a one-time pension contribution to be taken in January 2021 (One-time pension deductions must be initiated each year.)

- Step 1: View the IBM list of approved agencies on ibmretireecampaign.com.
- Step 2: Select up to three agencies you wish to contribute to through the pension deduction option.
- Step 3: Complete Option A and/or Option B by recording the agency code (found on the IBM agency list), the total of your monthly/yearly contribution amounts. If the agency code is left blank, your contributions will be directed to the United Way nearest your zip code.
- Step 4: Record the total amount(s) in Option A and Option B for the year only.

OPTION A: MONTHLY PENSION DEDUCTION (effective January 2021)

Enter up to three agencies and the amounts you wish to contribute to through the pension deduction option.

Agency Code: _____ \$ _____/Month = \$ _____/Year

Agency Code: _____ \$ _____/Month = \$ _____/Year

Agency Code: _____ \$ _____/Month = \$ _____/Year

OPTION B: ONE-TIME PENSION DEDUCTION (effective January 2021)

Enter up to three agencies and the amount you wish to contribute to one-time only through the pension deduction option.

Agency Code: _____ \$ _____/Year

Agency Code: _____ \$ _____/Year

Agency Code: _____ \$ _____/Year

TOTAL ANNUAL DEDUCTION:

Enter the total yearly donations in option A and B.

Total Annual Deduction: \$ _____



Instructions for Choosing Direct Contributions

Step 1: View the up-to-date IBM approved charity list at www.ibmretireecampaign.com. If your charity is not listed, you may write-in an eligible not-for-profit 501(c)(3) agency’s name, address, phone number and email, in the section at the end of this form. Please note, religious organizations such as churches, synagogues, etc. do not qualify unless the donation is being made to program that serves the community such as a homeless shelter, food bank, literacy program, etc.

Step 2: Choose your Direct Contribution option by making an ‘X’ in the box that reflects your preferred method of donation.

- A. Agency Website: You may make your donation directly through the agency’s website (if available) by following the agency’s website donation instructions.
- B. Stock: The transfer of shares of stock must be made directly to the agency by the retiree (or designee).
- C. Charitable Trust Fund: You must contact the appropriate party to execute the transfer of funds.
- D. Personal Check: Please make personal checks payable and mail directly to the agency.

Step 3: Record your contribution (s) in the fields below. Include the Agency Code as indicated on the approve list of agencies (www.ibmretireecampaign.com) along with the dollar amount donated. If your agency is not on the approved list of agencies write in an eligible non-for-profit.

Charity Code: _____	\$ Amount _____	Charity Code: _____	\$ Amount _____
Charity Code: _____	\$ Amount _____	Charity Code: _____	\$ Amount _____
Charity Code: _____	\$ Amount _____	Charity Code: _____	\$ Amount _____

Instructions for Writing-in an Agency:

If you wish to donate to an agency that is not on the IBM approved ECC/RCCC agency list, you may write in the eligible not-for-profit 501(c)(3) agency of your choice. *This option is only available through the Direct Contribution Method.* Please include agency name, address, email, and telephone number.

Agency Name _____

Agency Address _____

Agency Email _____ Agency Phone # _____ Donation Amount \$ _____

Submit Application for Processing:

E-MAIL – Save the completed application on your computer, then send the application as an attachment in an email to ibmretireecampaign@cdlinc.com

US Mail – Print the completed application and mail it to:

IBM RCCC Program
CDL
PO Box 325
New Cumberland, PA 17070-0325

Should you have questions, please call IBM Retiree Campaign customer service at 1-800-895-3004.