



**Dominion
Energy®**

EnergositySM

Retiree Giving Program Guidelines

The Retiree Giving Program is designed to enhance the impact of your contributions of time and dollars to qualified non-profit organizations (“causes”) through matching gifts and volunteerism. By matching your donations to eligible causes, we are working together to create collective impact in our local communities.

Dominion Energy has partnered with Benevity to administer the Retiree Giving Program within the EnergositySM online platform. Benevity is responsible for charitable database maintenance, giving portal maintenance, donation processing, and first-line customer service. Benevity utilizes United States and international databases to assess the eligibility of causes.

These guidelines are established by the Dominion Energy Charitable Foundation and are reviewed on an as needed basis. These guidelines are in place to help you understand the various opportunities for involvement. As you participate in the Retiree Giving Program, you are required to adhere to these guidelines*.

Program Highlights

- Retirees are eligible for the Matching Gifts and Volunteer programs.
- Matching to eligible causes are subject to a \$5,000 limit per participant, per calendar year.
- Matching gifts allows for personal tax-deductible gifts to be matched on a dollar-for-dollar basis.
- Retirees are encouraged to plan group volunteer projects and to log volunteer hours in EnergositySM.

Budget

Each participant is eligible for up to \$5,000 in matching per calendar year. This voluntary program will be available until the annual program budget is reached.

Matching Gifts Administration

Participants may submit a matching gift request in one of two ways.

- Gifts can be made directly through EnergositySM via personal credit or debit card payment and, if the cause meets these guidelines, the match will automatically calculate and be approved once gift is submitted.
- Gifts of cash or stock made directly to causes outside of EnergositySM may be submitted with a copy of an acknowledgement letter/e-mail from the cause or an IRS tax receipt from the cause for review and approval in the same calendar year the gift was made. Copies of donation checks or credit card statements are not a valid form of receipt.

Payments of matching gifts and personal gifts made through EnergositySM are disbursed together to causes in the final week of the month following the date that the donation was made. For example, gifts made in January will be received by the cause the last week of February.

Cause Eligibility

Participants may log volunteer hours with all causes in EnergositySM. In order for a cause to be eligible for matching gifts, it must be located in the United States or one of its possessions and must also be recognized by the Internal Revenue Service (IRS) as tax-exempt, designated a public charity under Section 501(c)(3) of the IRS Code and have a National Taxonomy of Exempt Entities (NTEE) code aligned with the guidelines outlined in this document and/or registered with the National Center for Education Statistics (NCES).

Ineligible Causes and Gifts

Certain causes and types of gifts are not eligible for matching gifts. These include, but are not limited to:

- Political, advocacy, or lobbying groups
- Religious organizations (including any organization with an "X" NTEE code)
- Name, image, and likeness (NIL) organizations
- Pledges, tithes, or tuition
- Gifts of real or personal property
- Gifts of in-kind services, materials, or supplies
- Gifts to individuals, fraternities, sororities, or labor organizations
- Gifts to instruments of federal, state, or local government
- Gifts made from a donor advised fund to an organization (note: gifts to a qualified donor advised fund are eligible for matching)
- Membership fees for which benefits are received
- Gifts made by spouses, domestic partners, or surviving spouses
- Tickets for benefit dinners or other events
- Collections or pooled gifts from several individuals that are reported as one contribution
- Future pledges are not match eligible, only pledges paid in-full can receive a match
- Donations to EnergyShare, or other company-administered programs

Volunteer Program Administration

Retirees are encouraged to volunteer with causes they care about. Retirees may submit group volunteer opportunities within EnergositySM to encourage others to join. All available volunteer opportunities will be approved by Dominion Energy's Community Engagement team prior to being posted. Please note that non-employee/retiree guests are permitted to attend only when noted within the volunteer opportunity.

Logging In To EnergositySM

Go to <https://dominionenergy.benevity.org>

Username: First two letters of your first name + First four letters of your last name + Last four digits of your social security number (Example: John Smith, 123-45-6789 = josmit6789)

Password: 'DE' + First two letters of your last name + First two letters of your first name+ '!' + Last four digits of your social security number + '#' (DE and the first letters of your last and first name should be capitalized) (Example: John Smith, 123-45-6789 = DESmJo!6789#)

[Learn More:](#)

For more information about how to use the platform, log-in to your account and select "Help" in the top right corner of your dashboard. If you still require additional support, you can contact Benevity's End User Care at support@benevity.com. You may not ask Benevity to enter match requests or track volunteer time for you.

If you have programmatic inquiries about the Retiree Giving Program, please send an email to at Energosity@DominionEnergy.com.

* The Dominion Energy Charitable Foundation reserves the right to suspend, amend or terminate this program at any time without notice and reserves the right to determine whether the award will be made. Interpretation is at the discretion of the Foundation, and its decisions are final. No participant or eligible organization will acquire any rights against the Foundation by reason of its failure to make a grant.