



## ONE HERITAGE FUND DONATION FAQs

### Why donate to the ONE Heritage Fund?

While we all hope that none is affected by a hardship, we will be there to support them when they do. Donations will help employees when they need it most. A confidential application is submitted to EAF whom either “approves” or “not approves” each grant application. The Heritage Group employees are not involved in the grant making process.

### Who can donate to the ONE Heritage Fund?

Anyone, including employees, customers, vendors and community groups may donate to the Fund. We hope that everyone donates, no matter how much. Every donation makes a difference and can be a one-time gift or an ongoing periodic contribution.

### How much of my donation goes to fellow employees?

Our goal is to enable The Heritage Group and its affiliate employees to personally help as many team members as possible, and therefore 100% of employee donations support fellow The Heritage Group employees. The company is covering the cost of all fund operating expenses to ensure that this is the case.

### Are donations tax deductible?

Yes, all donations are tax-deductible in the U.S. to the full extent permissible by law.

### How can donations/contributions be made?

- **Credit / Debit cards** - click on the “Donate” button on the ONE Heritage Fund web page. You can make a one-time donation or set up a monthly amount.
- **Text to Give** – In the U.S. you can donate by texting ‘OHEARF’ to 71777 and donate by credit/debit card.
- **Check** - Please make your check out to: Emergency Assistance Foundation, Inc. with “For (ONE Heritage Fund)” in the memo or the cover letter and mail to:  
Dept # 9884, Emergency Assistance Foundation, P O Box 850001,  
Orlando, FL 32885-9884.

- **Securities** - For in-kind publicly traded securities, direct the assets to:
  - Custodian: Morgan Stanley
  - ACAT/DTC Number: 0015
  - Account Name: Emergency Assistance Foundation, Inc.
  - Account Number: 090-024563-656
  - Memo/Reference: EAF – “Your Company or Fund Name”.
  - Have the broker/donor notify [doug@emergencyassistancefdn.org](mailto:doug@emergencyassistancefdn.org) when the transfer is made so we can sell upon receipt.  
Please note that the transfer of securities by your broker may take several business days.

### **How do I stop the credit/debit card monthly donation?**

If you wish to stop recurring credit/debit card donations that you set up using the online portal, please email [oneheritagefund@emergencyassistancefdn.org](mailto:oneheritagefund@emergencyassistancefdn.org) with a request to cancel the recurring donation.

### **Can donations be directed to a specific employee?**

Unfortunately, regulations do not allow for donations to be earmarked for specific individuals. All donations are added to the fund so as to support as many The Heritage Group employees as possible.

### **Do I get an acknowledgement for my donation?**

**Check** – Cancelled checks are acceptable forms of documentation for gifts under \$250. Each donor of \$250 or more will receive an acknowledgement from Emergency Assistance Foundation. If you would like to receive an acknowledgement, please provide your e-mail address.

**Credit / Debit cards** – Credit / Debit card statements are acceptable forms of documentation for gifts under \$250. Each donor of \$250 or more will receive an acknowledgement from Emergency Assistance Foundation. If you would like to receive an acknowledgement, please provide your e-mail address.

**Marketable securities** – Emergency Assistance Foundation will send you an acknowledgement validating receipt of the gift. If you would like to receive an acknowledgement, please provide your e-mail address.

### **Do I have to contribute to the Fund to be eligible to apply for assistance?**

Not at all. Donating to the Fund is completely voluntary. Eligibility for assistance is based upon need and qualifying circumstances.

### **Who can I contact for more information?**

You may also contact the ONE Heritage Fund Program HR Shared Services for verification to [HRSS@thgrp.com](mailto:HRSS@thgrp.com) for more information about the Fund.