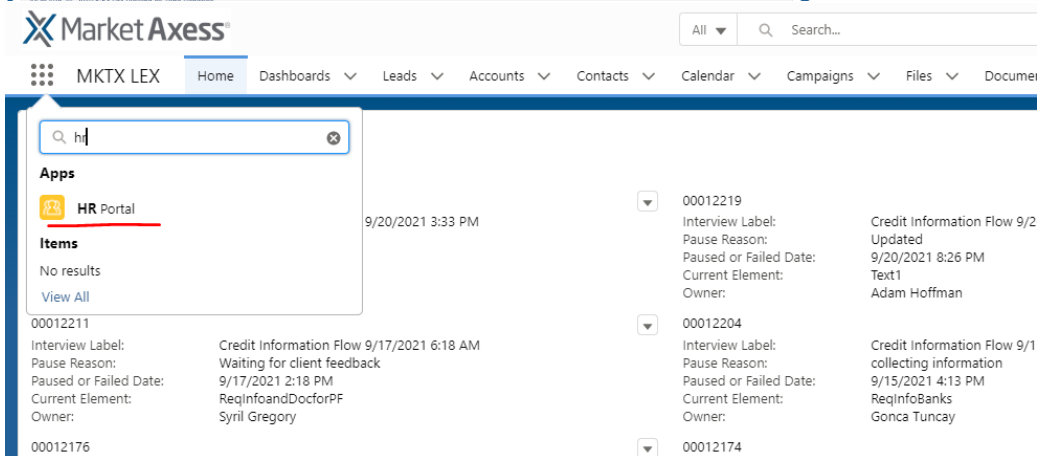
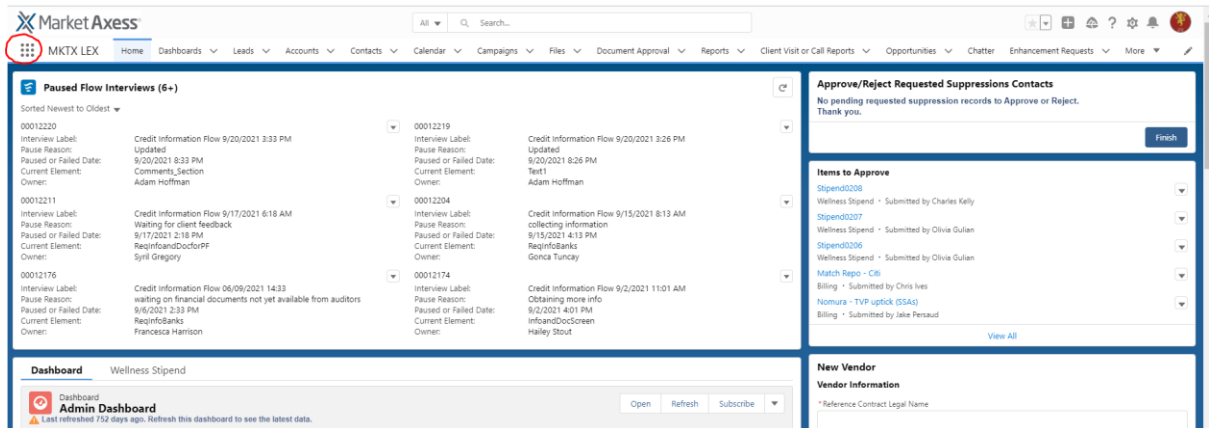
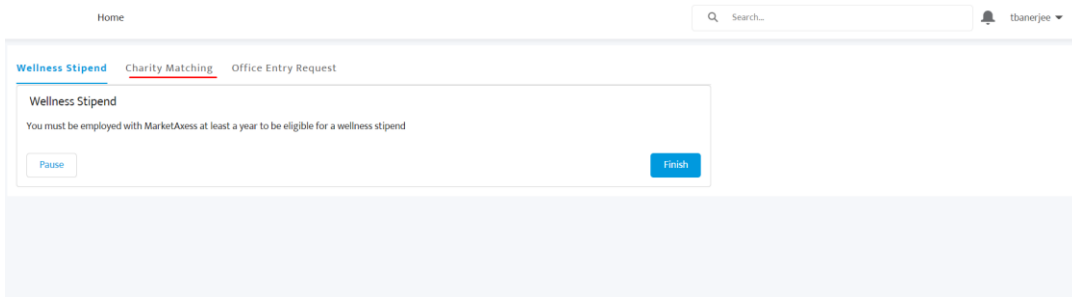


Charity Matching in Salesforce

- 1) Go to the HR Portal by clicking on the 9-dot grid symbol and typing HR Portal:



- 2) Once you're in the portal, click on the Charity Matching Tab:



- 3) Once you're on the form, begin filling the form (the fillable fields are at the bottom):

MARKETAXESS CHARITABLE GIFT MATCHING PROGRAM

Participant Eligibility

All full-time employees[1] of MarketAxess Holdings Inc. and its subsidiaries ("MarketAxess").

Minimum and Maximum Match

- MarketAxess will match 100% of any qualifying gifts
- The aggregate maximum match made on behalf of any employee per calendar year will not exceed \$2,000 (or £1,500)
- The minimum amount that will be matched is \$50 (or £30)

Parameters for Donations

To qualify for a matching contribution, the employee's gift must meet the following conditions:

- The gift must be an actual cash donation – not a pledge – or shares of stock
 - Shares of stock must be traded on a nationally recognized exchange
- The recipient organization must confirm receipt with the following details:
 - Cash

Scroll down to the below section of the form:

MARKETAXESS CHARITABLE GIFT MATCHING PROGRAM APPLICATION FORM

* Employee Name

Trina Banerjee

Organization Information:

* Organization Name

Test Charity Institution

* Organization Web Site

www.testcharityinst.com

* Is the organization a federally tax-exempt, 501(c)(3) or registered as a UK charity?

Yes

Where to send Matching Gifts:

* Address

Test Street

* City/State/Zip Code

Test City

* Contact Person

Test Charity Contact Person

* Contact Person Title

CEO

* Contact Person Phone Number

1234567890

* Contact Person Email

testperson@charityinst.com

* Type of Organization

Education

I am applying for a Cash Match:

* Gift Amount (\$50 minimum (or £30))

230.00

* Currency

USD

* Date of Employee Gift

Oct 8, 2021

Pause

Next

Hit Next after you complete the form and then attach the relevant documentation from the Charity Institute:

Click on 'Upload Files' or drag and drop you files on the Upload File button and then hit 'Done' on the progress indicator:

The screenshot shows the 'Charity Matching' section of a form. The form contains text about a financial gift of \$230.00 and instructions for uploading supporting documents. An 'Upload Files' modal is open in the foreground, showing a file named 'ST - CFETSIInstitutionalCode.csv' (3 KB) being uploaded. The 'Done' button in the modal is circled in red. The 'Upload Files' button on the form is also circled in red.

Check the radio button to confirm that you've uploaded the relevant document and hit Next:

The screenshot shows the 'Charity Matching' section of the form. The 'Upload Files' button is circled in red. Below the form text, the 'Yes' radio button is selected and circled in red. The 'Next' button is visible at the bottom right of the form.

Your request will be submitted to HR & Finance team for approval.