


# PAC Charitable Match Programs

## Case Study: Creating an Effective Operations Plan

September 30, 2025

Ellie Shaw  
Director, Federal Government Affairs  
American Express

# Agenda

- Program structure
  - Charity selection
  - Annual timeline
  - Eligibility requirements
  - Record keeping
  - Outsourcing
- 
- A solid blue horizontal bar spanning the width of the slide at the bottom.

# PAC Match Remains A Top Benefit

Does your company  
currently have an active  
PAC charitable match  
program?

37%



What is the dollar-for-dollar match ratio for contributions eligible for PAC match?

59%



Allow any 501(c)(3)  
with some exceptions

46%



PACs that offer PAC  
match as a benefit  
raised nearly twice as  
much as those that  
did not.

2X



Source: Public Affairs Council's  
2025 Corporate PAC Benchmarking Report

# PAC Match Program Overview

**\$448,000  
Dollars  
Matched**



**Charities in  
37 States**

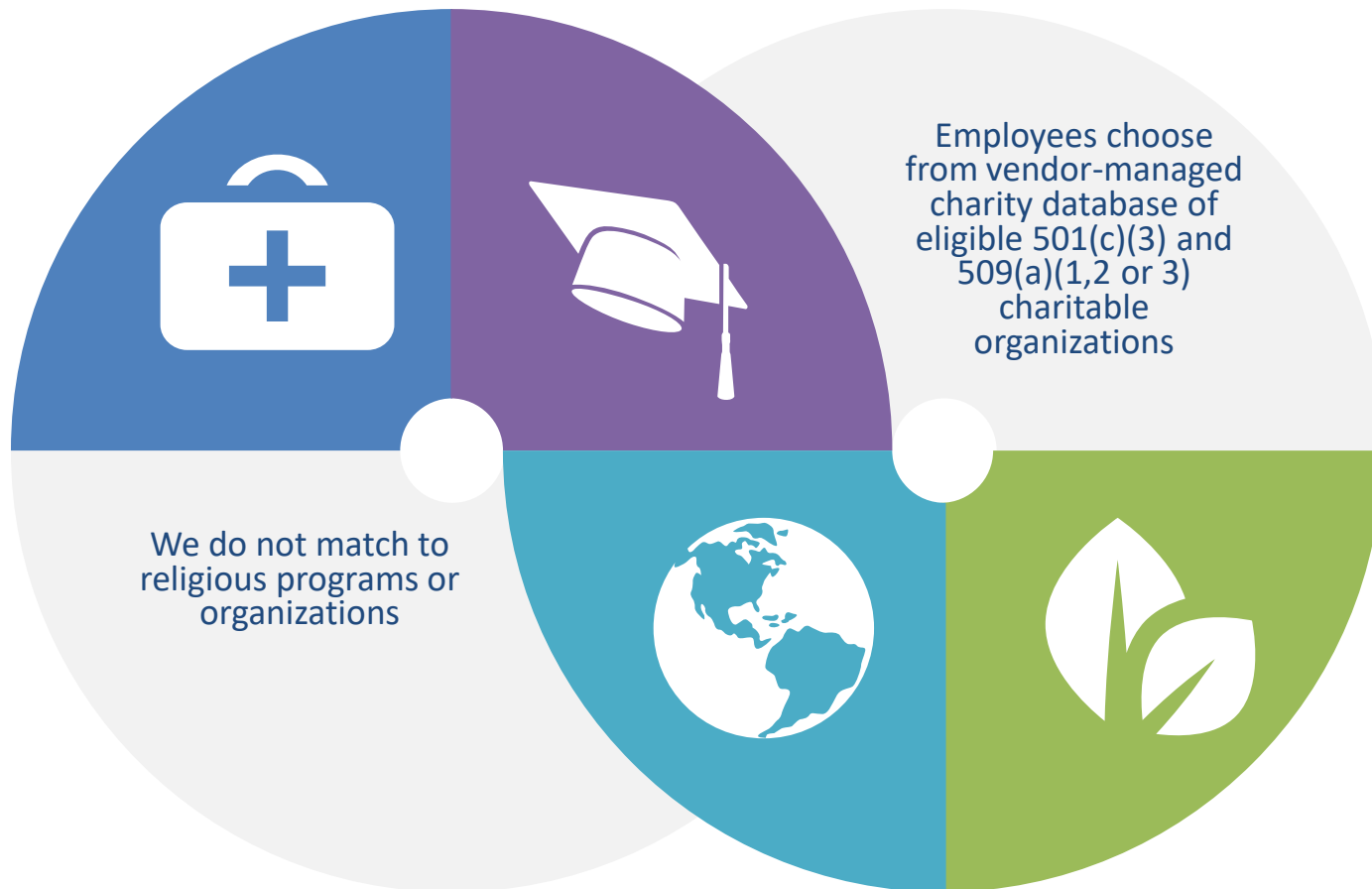
**329 Charities  
Matched**



## **Top 5 Charities**

- American Red Cross
- American Cancer Society
- City Harvest Inc
- Michael J Fox Foundation for Parkinson's Research
- Humane Society

# Charity Selection



# Charity Vetting & Compliance



IRS Exempt Organizations Business Master File and Automatic Revocation of Exemption List



Self-certification form (valid 24 months) signed by charity's CEO, President, Executive Director, COO, CFO, Vice President of Finance, Comptroller, or Treasurer

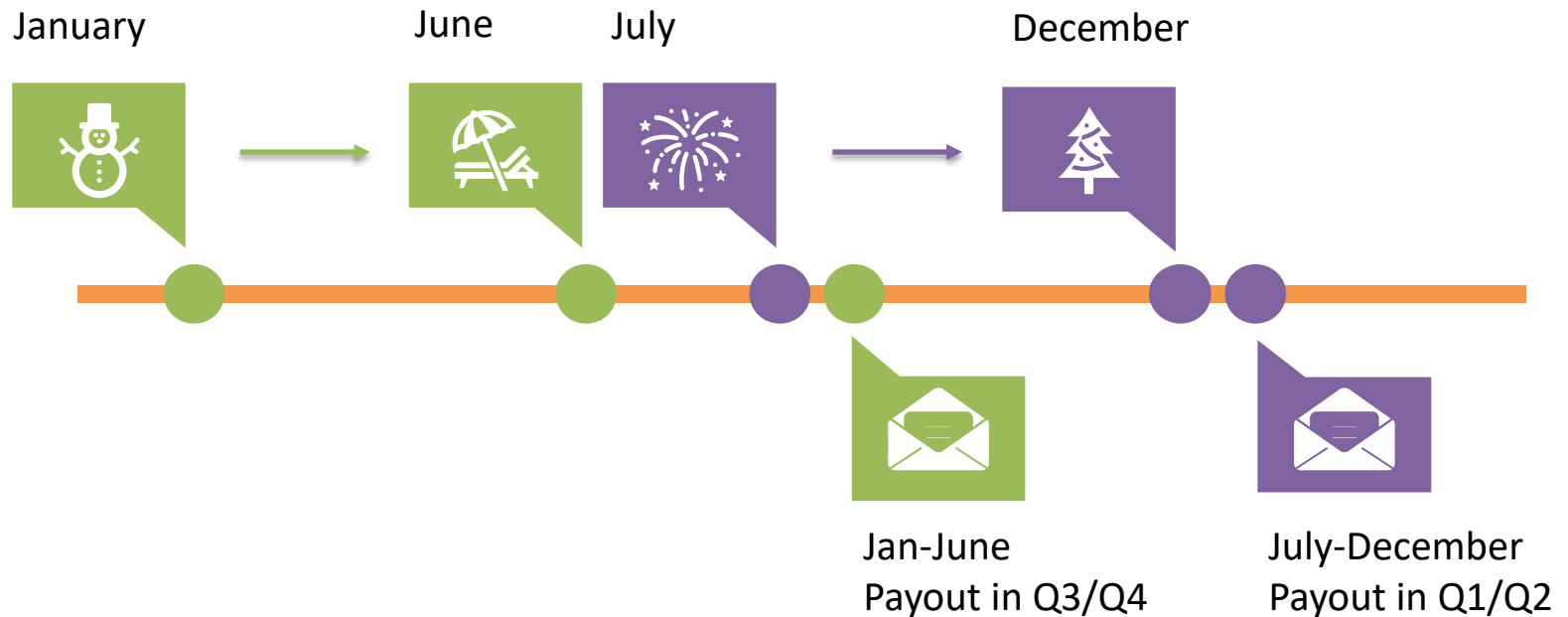


Director reviews new charity list, which includes the charity name, Employer Identification Number and mission statement



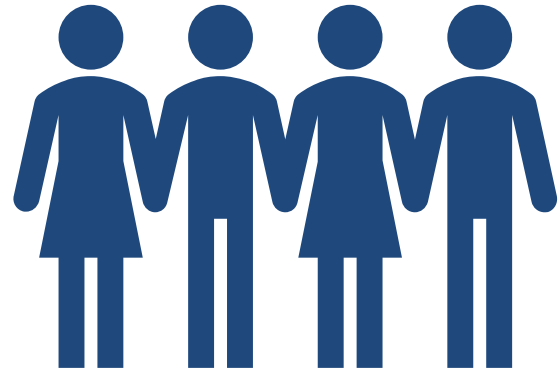
Office of Foreign Assets Control ("OFAC") & sanctions screening

# Annual Timeline



# Eligibility Requirements

Any colleague who is eligible to give to the PAC and who contributes a minimum of \$25 annually to the PAC is eligible to participate in the PAC Match program





# Oversight & Accountability



## Government Affairs

Oversees end to end process



## VENDOR

Not possible without our vendor



## Global Sanctions

Scrutiny on payments



## Internal Processes

Desktop procedure, process flow, risk/control/testing, audit requirements

# Record Keeping



Sharepoint



Record  
Retention



Audit Ready

# Outsourcing & Vendor Role

Hosts PAC and PAC match website and charity database



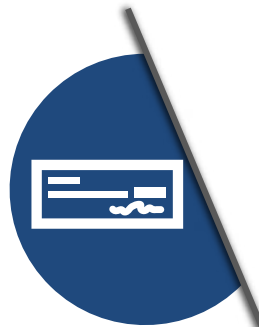
Performs pre-payout and pre-check writing OFAC & sanctions screening



Reviews charities and sends the self-certification compliance form to charities



Distributes checks to charities and notifies PAC members



Follows up with charities and PAC members as needed



Reconciles the PAC match checking account



# PAC Match Website FAQs

- What is the PAC?
- Who is eligible to participate in the PAC?
- What is the PAC Match program?
- Who is eligible to participate in the PAC Match program?
- How will the contribution to the qualified charity be made?
- Is this charitable contribution tax deductible for either the company or me?
- When will the company make the matching contributions?
- Do I have to give a minimum amount of money to the PAC to participate in the PAC Match program? Is there a maximum amount the company will match?
- Do the matching funds reduce the amount available for contributions to political candidates?
- Will my PAC match contribution count against my colleague Gift Matching Program limits?

# Questions?

Ellie Shaw

[ellie.a.shaw@aexp.com](mailto:ellie.a.shaw@aexp.com)

202-434-0152