



Participant Reference Guide

 GiveBack Benefits

NEW PARTICIPANT? GO TO WWW.TASCONLINE.COM OR CALL 800-422-4661 TO GET STARTED

GETTING STARTED

WELCOME TO TASC!

This guide is designed for individuals who are participating in their employer’s GiveBack Benefits offering with TASC.

In this guide, we will walk you through:

- MyTASC, our groundbreaking benefits administration platform, from the initial sign-up steps to navigating your benefits on the web or in the TASC mobile app.
- Your TASC Card®, the preferred way to access your GiveBack Benefits.
- Requesting reimbursement and managing MyCash.

If you have questions, go to **SUPPORT › CONTACT US** in MyTASC or in the app to submit a support request, or contact Customer Care by calling one of the numbers listed below.

TASC also offers an **Interactive Voice Response (IVR)** phone system so you can easily check your account information from anywhere at any time.

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QUESTIONS?

- Call **608-241-1900** or (toll-free) **800-422-4661** for Customer Care Monday - Friday from 8:00 AM - 5:00 PM (all time zones) or 24/7 for automated IVR information.
- Go to **SUPPORT › CONTACT US** in MyTASC or in the app.

GIVE BACK FOUNDATION DONOR ADVISED FUND

PARTICIPANT REFERENCE GUIDE

Welcome to the Give Back Foundation Donor Advised Fund ("Give Back Foundation DAF"). This guide is intended to assist you in understanding the benefits of the program as well as the important policies, procedures, rules and restrictions associated with establishing and maintaining an account within the Give Back Foundation DAF. All activities of Give Back Foundation DAF and donor participation in the program are subject to the terms and conditions of this guide. The Give Back Foundation reserves the right to modify the program and this guide at any time. In the event of any such modification, this guide will be updated and published on the TASC website. Give Back Foundation DAF is not limited to U.S. donors. Nevertheless, all figures in this guide are in U.S. dollars.

INTRODUCTION TO THE DONOR ADVISED FUND

Give Back Foundation DAF is a separate fund held by the Give Back Foundation, a public charity under the U.S. Internal Revenue Code. A donor-advised fund account offers you the opportunity to create an easy-to-establish, low cost, flexible vehicle for charitable giving as an alternative to direct giving or creating a private foundation. Donors enjoy administrative convenience, cost savings, and tax advantages by conducting their grant-making through the fund. A donor advised fund account is not a private foundation as that term is defined by the Internal Revenue Code.

Give Back Foundation DAF is a charitable vehicle that offers individuals and groups the flexibility to fund an account with tax-deductible contributions and then recommend grants to benefit U.S.-based charities in good standing at a time convenient to you, the DAF account holder. A donor advised fund account can provide tax benefits, accounting conveniences and simplified charitable giving. Contributions to a Give Back Foundation DAF account can be made at any time, are irrevocable and are immediately tax deductible to the fullest extent provided by U.S. law.

- *Availability of certain U.S. federal income tax deductions are limited to U.S. donors and may depend on whether you itemize deductions or not. Rules and regulations regarding tax deductions for charitable giving vary at the state level. Please check with your tax advisor. Tax deductions discussed herein refer specifically to U.S. federal taxes.*

ATTRIBUTES OF A DONOR ADVISED FUND

Give Back Foundation DAF account holders have the opportunity to:

- Make irrevocable charitable contributions to the Give Back Foundation DAF account from a member's own credit card or, in some employer-sponsored programs, through payroll deduction;
- Recommend grants to a broad selection of other qualified charities that are IRS-approved, and in good standing, anywhere, on your own timetable;
- Receive an immediate tax deduction up to the maximum allowed by law for contributions to public charities.

All contributions and grant recommendations are subject to the review and approval of Give Back Foundation and its Board of Directors. Give Back Foundation Directors may delegate any of their powers and authority under this program to employees or representatives of Give Back Foundation.

GIVE BACK FOUNDATION DONOR ADVISED FUND

ESTABLISHING AN INDIVIDUAL ACCOUNT

An individual account is expected to remain in operation for the lifetime of the donor. However, if your account remains inactive for 18 or more consecutive months at any time, your account will be terminated and the funds in the account may be distributed by Give Back Foundation to Give Back Foundation DAF's Charitable Operating Fund.

CONTRIBUTIONS TO ACCOUNTS

Contributions may be made directly by credit card or ACH via the TASC website or, in some employer-sponsored programs, through payroll deduction. Though TASC attempts to show all donations as quickly and accurately as possible in a user's account, there may be a delay with some transactions.

CONTRIBUTIONS ARE IRREVOCABLE

Once a contribution is accepted, it is an irrevocable charitable contribution to Give Back Foundation DAF. Accepted contributions are not refundable.

CHARITABLE INCOME TAX DEDUCTION

If you are a U.S. taxpayer, you will be eligible for an itemized U.S. income tax charitable deduction on the date that you make your contribution to Give Back Foundation DAF, subject to applicable limits under federal law. If you are not a U.S. taxpayer, you will not be eligible for such a deduction. As always, you should consult your legal or tax advisor about your personal situation.

CASH

Your deduction is for the amount of your cash contribution. Any refunded charges to a credit card donation that are reversed are not eligible and the donation previously credited to your account balance will be withdrawn.

NON-INTEREST BEARING ACCOUNTS

All member accounts at TASC are non-interest bearing.

INVESTMENT PORTFOLIO SELECTION

Give Back Foundation intends to invest the assets maintained in Give Back Foundation DAF accounts in a combination of investment portfolios, which are managed by Give Back Foundation. The investment strategy will develop as Give Back Foundation's account balances become sufficient to warrant investment. In the meantime, assets will be maintained in cash or cash equivalents to ensure maximum liquidity. The amounts deposited into your account will not be affected in any way by the performance of Give Back Foundation's investment strategy.

RECOMMENDING A GRANT

As an account holder, you may recommend grants from your Give Back Foundation DAF account to qualified charitable organizations. Grant recommendations can be made online via the TASC website. You may request a grant for any charity that is listed. TASC retrieves its list of eligible charities from the database vendors and/or Internal Revenue Service Publication 78. Only eligible charities will be listed on the TASC website. Give Back Foundation will review your completed and submitted recommendation. Give Back Foundation reserves the right to deny a grant recommendation.

Grants are processed on a monthly basis. If other members have requested grants to the same eligible charity(ies), these grants are aggregated and one payment is made to the charity(ies). Charities will receive payment for the full, aggregate amount from "TASC". Due to the costs associated with processing small donations, Give Back Foundation reserves the right to reserve disbursement of funds until the aggregate sum is greater than \$25.00.

GRANT AMOUNT AND NUMBER LIMITS

Give Back Foundation DAF will consider grant recommendations of any value. You are not permitted to make a grant recommendation for an amount greater than your account balance. If the amount of a grant recommendation exceeds the balance of a Give Back Foundation DAF account, no part of the grant will be made.

NUMBER OF GRANTS

Give Back Foundation DAF allows users to recommend an unlimited number of grants in any fiscal year (January 1 – December 31).

MINIMUM GRANT ACTIVITY

An account is inactive if over 18 months there is no activity in the account such as logging in, making a donation, or making a grant recommendation. We will make every reasonable effort to contact the account holder via email prior to 18 months and encourage him/her to engage in some activity with the account. If the account holder(s) does not respond, we will distribute 100% of the account balance to Give Back Foundation's Charitable Operating Fund.

ACCESSING YOUR ACCOUNT

SIGN UP

To establish access to your TASC account, you must complete the following sign-up steps.

1. Go to www.tasconline.com and click the **LOG IN** button on the menu bar, then select the **INDIVIDUAL/EMPLOYEE** option. This will bring you to the **SIGN IN** page.
2. On that page, find the **FIRST TIME HERE?** prompt. Below that, click **SIGN UP**.
3. Enter the email address that you have on file with your employer or plan sponsor. Then create a password.

▶ *If the address you enter is not recognized, contact your employer or plan sponsor to request that they add your preferred email to your TASC account. To complete the sign-up steps you will also need your 12-digit TASC ID, found on your welcome letter or on the back of your TASC Card.*
4. Check your email for a 6-digit verification code. Enter that code to verify your address.
5. To ensure the safety of their information and funds, TASC requires all users to enable **Two-Factor Authentication (2FA)** by entering and verifying a mobile phone number. For the initial signup process, TASC will send a verification code to your email address. Enter the six-digit code and click **VERIFY**.
6. Read through and agree to the **Terms of Use**.

Congratulations! You have successfully signed up. You can now sign in and manage your GiveBack Benefits in MyTASC.

SIGN IN

After you complete the initial sign-up steps, you can sign in with your username and password on the web, or download the TASC mobile app for iPhone or Android to manage your benefits on the go!

BIOMETRIC SECURITY

For added security, mobile app users should enable the biometric security settings available on their device, like Apple's Face ID for iPhone. Go to **SETTINGS** › Sign In & Security to manage these.



SECURITY TIPS

Passwords

- Always use a strong password.
- Change your password regularly.
- Don't reuse passwords from other accounts.

Sign In Options

- Avoid using the **Remember Me** option, especially on a mobile device.
- Don't use the **Show Password** option if you're in public.

DOWNLOAD THE TASC MOBILE APP



Giving Savings Account

Non-DAF

The Giving Savings Account helps you save toward giving goals. It offers flexibility since funds contributed are not considered tax-advantaged until they are donated to charity, allowing you to withdraw your contributions prior to donation should an unforeseen need arise.

FUNDING

Employers and employees can contribute via payroll deduction, bank account, or debit or credit card.

ELIGIBILITY & ENROLLMENT

Your employer determines eligibility requirements for participation and available enrollment methods.

ACCESSING FUNDS

You can access funds in the Giving Savings Account multiple ways.

- You can make donations to the charities of your choice in MyTASC or in the TASC mobile app.
- You will also receive a TASC Card which can be used to make a donation, if the charity accepts card payments.
- Donations are tax deductible if funds are donated to a 501(c)(3) organization.
- You can also transfer funds to your MyCash account and from there to a personal bank account if needed. Funds transferred out in this way are considered taxable income. See **MyCash Transfers** on page 9 for steps.



Charitable Donation Account

DAF

The Charitable Donation Account is another great way to help you with your giving goals. Similar to the Giving Savings Account, you contribute to this account; however, all contributions are tax-deductible, because once funds are contributed, they must be donated to a 501(c)(3) organization eventually. Participants can choose when to disburse funds to their chosen charity.

The Charitable Donation Account is a component of a Donor Advised Fund (DAF) and you can grow your balance and even make investments with no brokerage fees.

FUNDING

You can contribute to the Charitable Donation Account via payroll deduction, by transferring funds from your MyCash account, or contributing directly from your personal bank account or debit or credit card. Your employer can also make contributions to your Charitable Donation Accounts as a lump sum or as a contribution match.



ELIGIBILITY & ENROLLMENT

Your employer determines eligibility requirements for participation and available enrollment methods.

ACCESSING FUNDS

Like the Giving Savings Account, you can access funds in multiple ways.

- You can make donations to the charities of your choice in MyTASC or in the TASC mobile app.
- You will also receive a TASC Card which can be used to make a donation, if the charity accepts card payments.
- Donations must be made to a 501(c)(3) organization.

DONATION HISTORY

It's easy to obtain a record of your donations in MyTASC.

1. From the **TRANSACTIONS** menu, select **TRANSACTIONS**.
2. Filter your transactions by benefit account and select your Charitable Donation Account. You can also specify a range of dates.
3. Click the **CSV EXPORT** button to download a report of all entries shown on your screen.

Crisis Fund

Employer Account

Between natural disasters and personal hardships, people want to do their part to help and a Crisis Fund makes it easy to respond. Your employer sets up a fund in advance, then employees may request funds for an applicable crisis.

Both you and your employer can donate to the fund, and contributions are tax deductible upon donation, making it that much easier to help those in need.

The Crisis Fund is tax-advantaged, meaning all funds out of the account are tax-free and all funds contributed into the account are eligible for a tax deduction. Subject to Internal Revenue Code (IRC) Section 139 restrictions for crisis definitions and the federal declaration of a state of emergency, all funds granted to an employee because of a pandemic or other personal hardship are tax exempt.

FUNDING

You can help contribute to the Crisis Fund via payroll deduction, bank account, debit or credit card and even an already-funded, employer-sponsored Charitable Donation Account contribution. Your employer can also make contributions.



ELIGIBILITY & ENROLLMENT

Your employer establishes the eligibility rules for employee participation. Federal guidelines govern what constitutes a crisis; refer to IRC Section 139.

- Your employer establishes an independent board who will review employee applications based on pre-established rules.
- The employee experiencing a crisis or tragedy submits an application.
- The independent board reviews the application.
- If the application is approved, the employer enrolls the employee in the **Crisis Account** and awards funds for the employee to access.

CRISIS ACCOUNT

This is the employee account that uses funds awarded via the **Crisis Fund**.

ELIGIBLE EXPENSES

Funds in the Crisis Fund are to be used for the defined purpose of providing financial support to employees struck by personal hardship or crisis; refer to IRC Section 139. The Crisis Fund cannot make disbursements to employees for loss of income.

ACCESSING FUNDS

In MyTASC or in the TASC mobile app, once you see the contribution in your Crisis Account, you can access the funds in two ways:

- Request a TASC Card to use to pay for expenses necessary due to natural disaster, personal hardship, etc. See the **TASC Card** section on page 8 for more info.
- Transfer the awarded funds directly to your MyCash account, and from there into your personal bank account to be used for similar expenses. See **MyCash Transfers** on page 9 for steps.

Scholarship Fund

Non-DAF

Support each other in good times too with a Scholarship Fund. Thanks to employer and employee tax-advantaged donations, this fund supports education with scholarships for the dependents of employees.

The employer sets the amount of scholarship dollars to be awarded and the criteria award recipients must meet, then approved recipients receive a contribution from the fund toward their education costs.

FUNDING

Like the Crisis Fund, contributions to the Scholarship Fund can be made by you and your employer.

ELIGIBILITY & ENROLLMENT

Your employer sets the eligibility rules for employee participation. Contact your HR department for complete details.

- Your employer determines how much will be awarded per each scholarship.
- You submit an application on behalf of your child or dependent and provide proof of secondary education enrollment to your employer.
- Once your employer (or outside entity contracted to judge applications based on a set of guidelines) approves your application, your employer enrolls you in the Scholarship Account and awards funds for you to access.



ELIGIBLE EXPENSES

Tuition and fees, plus books, supplies and equipment required for instruction.

ACCESSING FUNDS

In MyTASC or in the TASC mobile app, once you see the contribution in your Scholarship Account, you can add your dependent and link them to your Scholarship Account. See the **Dependents** section on page 12 for more info.

Once this has been done, there are two ways to access the funds:

- You can issue a TASC Card to your dependent for them to use to pay tuition and fees or purchase books, supplies and equipment required for instruction. See the **TASC Card** section on page 8 for more info.
- You can request reimbursement for the above expenses, if you or your dependent paid out of pocket. See **Reimbursement Requests** on page 10 for more info.

The TASC Card

Your TASC Card is the preferred and most convenient method to access available account funds for charitable donations and all eligible expenses. It automatically pays for and verifies most eligible expenses at the point of purchase, eliminating the need to request reimbursement and wait for payment.

You will receive your TASC Card within 1-2 weeks of your initial enrollment. It will arrive at your home address, along with your Cardholder Agreement, in a plain white envelope. Your TASC Card is valid for four years and will be reissued at the beginning of the expiration month shown on the back.

SMART CARD

Our smart card technology allows you to use one card to access funds in all your benefit accounts. And not only does your TASC Card know which accounts to access for funds, it also knows in which order the accounts should be accessed when needing to pay for eligible expenses. You can even purchase benefit-eligible items and non-eligible items in the same transaction with MyCash.

USING YOUR CARD

The TASC Card works like a typical debit card but is used as a credit card for all eligible expenses, based on the funds available in your benefit accounts. Rather than paying out-of-pocket and waiting to be reimbursed, the TASC Card allows you to pay for eligible expenses at the point of sale.

When using your TASC Card, the amount of the expense is automatically deducted from your available benefit account balance and paid directly to the authorized provider.

Remember to save your receipts, as you must retain records and documents to validate your TASC Card transactions, if requested. In some cases, TASC may require additional documentation regarding a TASC Card transaction.

You can use your TASC Card at merchants inside the U.S. who accept Mastercard.

REQUESTING A NEW CARD

To request a card for a spouse or dependent, follow these steps below.

1. Go to the **TASC WALLET** menu and click the **REQUEST NEW CARD** button.
2. Select the **REQUEST A CARD FOR A DEPENDENT** option.
3. Select your spouse or dependent, verify your mailing address, and click **SUBMIT**.



What is MyCash?

MyCash is an individual cash account that securely holds your reimbursement funds until you spend or move them.

When you request a reimbursement for a benefit account expense, funds are moved from your benefit account balance into your MyCash account, usually within 12 hours—faster than direct deposit! Access your MyCash funds in any of the following ways:

- Swipe your TASC Card at a merchant that accepts Mastercard. (Individual merchant restrictions may apply.)
- Withdraw cash at ATM using your TASC Card. Request a PIN online or in the app.
- Transfer funds to a personal bank account.
- Transfer funds to any TASC GiveBack Benefits account.



MYCASH TRANSFERS

TASC's industry-exclusive MyCash tools let you make transfers when it's convenient for you! In MyTASC or in the app, transfer funds from MyCash to a personal bank account at any time, or set up a recurring schedule.

One-Time

1. Select the **MYCASH BALANCE** menu, then select **TRANSFER BALANCE**.
2. Select the bank account you would like the funds to be transferred to (or add a new account) and select **NEXT**.
3. Enter the transfer amount and select **NEXT**.
4. Review the transfer and select **SUBMIT**.


Recurring

1. Select the **MYCASH BALANCE** menu, then select **SCHEDULE A BALANCE TRANSFER**.
2. Select when you want the transfer to happen.
3. Select the bank account you would like the funds to be transferred to (or add a new account) and select **NEXT**.
4. Enter the transfer threshold (minimum \$25) or date and select **NEXT**.
5. Review the schedule and select **SUBMIT**.

Funds are forwarded from your MyCash account to your bank within 48 to 72 hours of a completed submission.

Remember to verify receipt of deposits before writing checks against expected payments (check with your financial institution for availability of funds). TASC is not responsible if your bank account is assessed insufficient fund fees in anticipation of required deposits to cover requests for reimbursements.

Delete a Schedule

1. Select the MyCash balance menu, then select **MANAGE MYCASH TRANSFER SCHEDULES**.
2. Select the  icon to delete your current schedule.

NO LONGER PARTICIPATING?

- TASC GiveBack Benefits never expire.
- Keep your TASC Card to access any remaining MyCash funds. You will be charged a \$5 monthly Cash Account Access Service fee, deducted from your MyCash account each month until all funds are depleted.

Reimbursement Requests

If you paid out of pocket for an eligible expense without using your TASC Card, you can request a reimbursement from your GiveBack Benefits account to pay yourself back.

You may request reimbursement for:

- Expenses that are eligible for reimbursement from your enrolled GiveBack Benefits account.
- Expenses incurred during your period of eligibility for the applicable plan year, including any grace period.
- Expenses incurred by eligible plan participants, i.e., you, your spouse and your eligible dependents or relatives.
- Expenses for which services have been provided, even if you have not paid for the service. Pre-payment for a future service that has yet to be provided is not eligible, however.
- Expenses that have not been previously reimbursed under any other benefit plan or claimed as an income tax deduction.

STEPS TO REQUEST REIMBURSEMENT

1. From the **OVERVIEW**, select the **REQUEST A REIMBURSEMENT** button.
2. Select who incurred the expense.
3. Select the expense date.
4. Enter the expense amount, the merchant or provider name, and a description of the expense.
5. Attach verification.
6. Select **NEXT** to review your request, then **SUBMIT REIMBURSEMENT REQUEST**.

Your reimbursement is deposited into your MyCash account. See **MyCash** on page 9 for more info.

VERIFICATION

IRS regulations require that tax-advantaged funds be used for eligible expenses only. When you request reimbursement, be sure to attach verification that includes the following information.


- **The name of the person who incurred the expense.** This is you, or it may be your spouse or a dependent.
- **The expense date.** This is the date the service was provided, or when the expense was incurred. It's not necessarily the payment date, but it may be.
- **The expense type.** A description of the service provided or the items purchased. Credit card slips may not have this information, so ask for an itemized statement if that's the case.
- **The name of the provider or merchant.** This is typically shown on a bill, statement or EOB but is not always present on a receipt. Be sure to check.
- **The expense amount.** Your out-of-pocket cost or the amount owed after insurance. Ideally, this will be the same as your reimbursement request amount. If it is not, you may need to show your calculations (e.g., sales tax applied).

MANAGING YOUR ACCOUNT IN MYTASC

Account Management

In addition to your GiveBack Benefits, you can demographic info, bank info, dependent info and security settings online.


PROFILE

Your **PROFILE** is where you can go to update your phone number or address if that information changes. Click the  icon next to any field to make changes. (To update the email address on file for your account, contact your employer.)

BANK ACCOUNTS

Go here to add your bank information for MyCash transfers. Click **LINK A NEW BANK ACCOUNT** and enter a nickname for your account, the routing number, the type of account (checking or savings), the name of your bank, and your account number, then click **LINK**.

DEPENDENTS

Manage your dependents from this screen. To add a new dependent, click the **ADD DEPENDENT** button and input their information, then click **ADD**. To make changes to an existing dependent, click the  icon next to their name.

SIGN IN & SECURITY

Here you can change your password or manage your 2FA settings. See **Accessing Your Account** on page 3 for more info.



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