

Community Partnership



2009 Community Partnership Individual Matching Gifts Program – U.S. Employees Only

BNY Mellon will match employee donations to arts and education organizations at a rate of 50% up to a specific maximum. See the Program guidelines available on MySource or in the Resource section of Community Partnership Online for more information.

You can make donations two ways:

- Go online and make a donation via credit/debit card and request the match automatically
- OR -**
- Make a donation directly to a qualifying organization by completing this form and sending it with your check or credit/debit card donation to the organization or sending this form to the organization and instructing your broker to transfer the stock securities (Step 1). Then after the donation has been sent, go online and request a match (Step 2). This form will provide the organization important information and assist you in entering your match request.

Step 1

Complete the following information and send a copy of this form to your charitable organization.

Donor Name (Employee name)		Office Telephone Number	Email Address	
Full Legal Name of Recipient Organization:				
City		State	Zip Code	
Amount of Gift:	Date of Gift:	Method of Payment: <input type="checkbox"/> Check <input type="checkbox"/> Credit/debit card <input type="checkbox"/> Stock/securities		
Name of Security:		Number of Shares:	Date of Quote:	Quoted Market Value:

Step 2

After your donation has been sent to the organization, logon to Community Partnership Online at www.easymatch.com/bnymelloncommunitypartnership to request your match. Once logged in, access Matching Gifts and use the above information to request your match.

Once you have submitted your match request, the recipient organization will be contacted and asked to verify receipt of your donation. The organization will have 90 days to confirm receipt of your match request. If the organization does not respond within the allotted time, the request will be cancelled. After verification, your match will be processed. Company matches will be processed the month following the quarter the Community Partnership program receives confirmation of your donation by the recipient organization.

NOTES

- **The Community Partnership program will not accept or match payments made to/for:** Individuals rather than registered charities; influencing legislation or electing candidates to public office; religious programs of churches or other sectarian organizations; services; tuition; dues; subscriptions; preferential seating; sponsorships; payments for tickets/tables for benefit functions; payments for auction merchandise; insurance premiums; athletic programs; scholarships; clubs and groups such as membership associations, sororities/fraternities, boosters and athletic clubs; gifts made to private foundations; bequests or life income trust arrangements; cumulative gifts from several individuals reported as one contribution; any contribution not made as a direct contribution to an eligible organization; any organization not aligned with the Code of Conduct or our corporate values, or which may involve BNY Mellon in controversial issues. Also note that double-counting is not permitted: requests for contributions can be matched by only one component of the Community Partnership matching program.
- When requesting your match, you will be asked to certify your donation did not involve any of these items before the match can be completed.
- Should your organization not be an organization currently in the BNY Mellon database, it will go through a vetting process to ensure it is eligible within the Program guidelines.
- Company matches are disbursed to recipient organizations on a quarterly basis with monies paid out the month following the calendar quarter, provided all steps and verifications have been completed.

2009 COMMUNITY PARTNERSHIP INDIVIDUAL GIFT MATCHING PROGRAM

U.S. Employees Only

The Community Partnership Gift Matching Program recognizes and encourages the involvement of BNY Mellon employees in their communities.

Donor Eligibility

Donors must be active, full- or part-time employees of BNY Mellon or one of its wholly-owned subsidiaries. Donors must be eligible to receive BNY Mellon benefits.

Recipient Eligibility

Recipient organizations must fall within one of the following categories:

Elementary and Secondary Schools

Any private or public elementary or secondary school located within the United States, which awards diplomas recognized by a state department of education, and which is accredited by the appropriate national or regional accrediting association or by a state department of education.

Higher Education

Any private or public junior or four year college or university and/or graduate school, which is a degree granting institution, accredited by a nationally recognized accrediting association, a state department of education, or a state university and is located within the United States.

Literacy

Literacy organizations will be considered as matching gift recipients if the promotion or delivery of literacy services is the sole function of the organization.

Cultural Organizations

Eligible cultural organizations include performing arts organizations (dance, music, and theater), museums, historical societies, arts funds or councils, cultural centers, libraries, public radio and television stations, parks, zoos, botanical gardens and conservancies.

All recipient organizations must be recognized by the Internal Revenue Service as organizations to which tax-deductible contributions may be made and must have an IRS designation of 501(c)(3), or be recognized as tax-deductible under Section 170(c) of the Internal Revenue Code.

The Employee's Gift

A personal gift, in the form of check, credit or debit card, or securities, must be paid, not merely pledged, to an eligible organization. The gift must be from the personal funds of the employee and not include any monies provided by other individuals or organizations.

The market value of a gift of securities will be determined by the closing price on the day the gift was made. If no sale occurred on the gift date, the assigned market value will reflect the most recently published closing price preceding the date of the gift.

Match Parameters

The Community Partnership program matches employee donations to eligible Arts & Education organizations through the Individual Gift Matching Program on a \$.50 to \$1.00 basis in 2009 for a maximum company match of \$4,000. The minimum employee gift eligible for matching is \$50. Gifts matched through the Global Giving Campaign dollar for dollar reduce the maximum company match available through the Individual Gift Matching Program.

The Community Partnership program will not accept or match payments made to/for:

Individuals rather than registered charities; influencing legislation or electing candidates to public office; religious programs of churches or other sectarian organizations; services; tuition; dues; subscriptions; preferential seating; sponsorships; payments for tickets/tables for benefit functions; payments for auction merchandise; insurance premiums; athletic programs; scholarships; clubs and groups such as membership associations, sororities/fraternities, boosters and athletic clubs; gifts made to private foundations; bequests or life income trust arrangements; cumulative gifts from several individuals reported as one contribution; any contribution not made as a direct contribution to an eligible organization; any organization not aligned with the Code of Conduct or our corporate values, or which may involve BNY Mellon in controversial issues.

Also note that double-counting is not permitted: requests for contributions can be matched by only one component of the Community Partnership matching program.

How the program works

Donors may make a donation online at www.easymatch.com/bnymelloncommunitypartnership via credit/debit card and request the match automatically; or

Make a donation directly to a qualifying organization by completing the donation form and mailing it with their donation to the organization. After the donation is sent, the employee logs onto Community Partnership Online at www.easymatch.com/bnymelloncommunitypartnership to request a match for their donation.

Once the match request is submitted, the organization will be contacted via e-mail and asked to verify receipt of the donation. The organization will have 90 days to confirm receipt of the donation. If the organization does not respond within the allotted time, the request will be cancelled. After verification, the match will be processed. Company matches will be processed the month following the quarter the Community Partnership program receives confirmation of the donation by the recipient organization.

Incomplete matching gift forms or forms submitted for gifts that are ineligible for matching will be returned to the employee. The employee is responsible for notifying the organization that a matching gift request has been declined.

BNY Mellon recognizes the worthiness of the many fine organizations to which employees make charitable contributions. However, only those organizations that meet requirements as set forth above are eligible to receive matching gifts. BNY Mellon reserves the right to suspend, amend or terminate this program at any time. The interpretation and implementation of this program shall be determined by BNY Mellon and all decisions will be final. This program supersedes any previous matching gift programs of BNY Mellon and its subsidiary entities.