

Morgan Stanley Charitable Accounts

Donations outsourced to: Charity Giving Station. Login required. New Program - As of 12/31/07 Morgan Stanley no longer will match employee donations to accredited educational organizations but can qualify for the Volunteer (VIP Program). The Co. will match 0.25:1.00, to any 501(c)(3) non-profit institution. The Charitable Spending Account has taken the place of the old matching gift program. Employees, who contribute through the Annual Appeal held each fall, are eligible to receive up to \$4,000 in corporate funds that they can direct to US charities. Unlike traditional 'matching gifts' programs, Charitable Spending Accounts offer employees the option of directing these corporate dollars towards any US charity, and not only those that they have personally funded. Participating employees may also make as many allocations with their accounts as they would like during each year. Company will match annually from Late Oct-Early Dec. Contact Giving Station for more questions.

Per Alexis Nissenbaum, Morgan Stanley, NYC

Create Hope States:

MS previously matched gifts only to educational institutions. This matching gift program ended on Dec 31, 2007, and was replaced by the Morgan Stanley "Charitable Spending Account" (CSA). The CSA program is new to Morgan Stanley this year and replaces the traditional matching gifts program which ended at the close of 2007. For this program, each eligible employee can earn Morgan Stanley matching funds for their CSA by giving to charities and the Morgan Stanley Foundation. Gifts to the charity of the donor's choice are matched into the CSA by Morgan Stanley at \$0.25 on the dollar; gifts to the Morgan Stanley Foundation are matched by CSA at 100%. A donor can accumulate up to \$4000.00 of Morgan Stanley matching funds in their CSA per year. Once funds have been accumulated in the CSA, the donor can then direct those funds to the charity of their choice. This does not need to be a charity that the donor has given to in the past, so you may receive a Morgan Stanley "match" for a gift that you never received from the donor. These CSA gifts should be accounted as gifts from Morgan Stanley and treated as an employee directed grant. The employee should receive soft credit and Morgan Stanley should receive tax credit for the gift.

Per Tom Wilk, Charity Support Coordinator, 1-866-676-4283

VIP Program:

Our matching is based on employees sweat equity giving money to organizations that employees support. If an employee has been with the firm for at least a yr, and volunteered with your org. for at least a year, the employee can then apply for what is called a VIP grant.