



Broadridge Financial Solutions, Inc. Matching Gift Guidelines

BROADRIDGE acknowledges its corporate, social, and community responsibilities in many ways. One of its programs is the support of community charities and civic organizations through the annual United Way campaign. The United Way approach is a community undertaking that is not intended to support individual causes or education. Therefore, to add broader dimensions to BROADRIDGE's contribution program (i.e., specific charities and Education), the company has a Matching Gift Program.

Matching gift means that BROADRIDGE will contribute an equal amount to any eligible institution that you support with a **personal** contribution. The program has two objectives:

1. To support deserving institutions selected by associates for their personal gifts;
2. To help associates assume a larger role in community activities and philanthropy.

Details concerning the entire program are outlined below, which also includes instructions for processing a matching gift. We encourage you to support worthy causes and to make full use of this program.

Policy – BROADRIDGE will match contributions by all full-time and part-time associates (with at least three months of service) to qualified institutions dollar for dollar. **The minimum contribution is \$50. BROADRIDGE will match an associate's combined gifts up to a maximum of \$1,500 per calendar year.**

What institutions are eligible? In general, five categories of institutions, which are located in the United States and qualify for tax deductible status, are eligible. (Having a tax-deductible status does not automatically qualify an organization for matching funds).

1. National charities (e.g., American Cancer Society, Red Cross, etc.), which meet the standards of philanthropy established by the Better Business Bureau. The BBB Wise Giving Guide is available on-line at: www.give.org. Click on "Charity Reports" to view your chosen charity, and then click on the charity to verify that it meets all the standards.
2. Four-year colleges and universities (located in the U.S.), which are non-profit and accredited, and organizations associated with these qualified educational institutions (e.g., alumni funds, foundations, etc.).
3. National educational (public) television and radio stations.
4. Hospitals which are duly accredited.
5. Art, history, and science museums, libraries, and zoos open to the public.

What institutions are not eligible? Numerous other institutions are worthy of financial support; however, we are not able to support all those in need. The following is a sample of institutions that are not eligible:

1. Fraternal, social, religious, or political institutions.
2. Local health agencies (e.g., mental health centers, clinics, local food banks, and hospices) and health related programs (e.g., volunteer ambulance units), because most agencies receive BROADRIDGE support through the local United Way campaigns.
3. Pre-K, primary, secondary, and charter schools.

If an associate participates in a fundraiser for one of the five eligible categories, **BROADRIDGE will only match the associate's personal contribution. We cannot match contributions collected from others, nor can we match group donations.** Each associate must submit an individual form for his or her own contribution (*minimum of \$50*).

How does the program work? Personal contributions *must be made by check or credit card (no cash)* to the institution. Pledges, dues, subscriptions, insurance premiums, or payments not made directly to an institution do not qualify.

The associate completes Part A and sends the form, with the contribution, to the designated institution.

Please note: although the form may be copied, the associate's original signature must appear on the form that is submitted for payment. We do not accept faxes or copies of signatures.

The institution completes Part B to verify the gift and forwards the form to **Broadridge Financial Solutions, Inc., Attention: Patti Paccia, 60 Research Road, Hingham, MA 02043**. Payments will be authorized upon determining eligibility of the institution. Matching payments will be made quarterly and sent directly to the recipient institutions. Individual acknowledgement of the match is not sent to the associate. An associate may restrict a gift by specifying the way a contribution is to be spent. Matching gifts by BROADRIDGE, however, will be unrestricted.

BROADRIDGE is responsible for the administration, interpretation and application of this program and its decisions will be final. This program may change or be terminated at any time.

For further details, please contact Patti Paccia, HR Programs Specialist, at patti.paccia@broadridge.com or 781-740-3686.