The BNY Mellon Charitable Gift Fund ("Gift Fund") offers a simple and tax-efficient way to maximize the impact of your charitable giving. A donor advised fund with the Gift Fund allows you to create an account that is designated for charity. Contributions may be eligible for a tax deduction and grow tax-free, compounding the value of your philanthropy.\(^1\) Grants are distributed at your own pace, providing the opportunity to develop a strategic approach that better supports the causes that matter most to you.

**HOW IT WORKS**

**Contribute**
Make irrevocable gift of cash, securities or complex assets

**Invest**
Recommend the investment strategy that best fits with your giving plans\(^2\)

**Grant**
Research charities and make grant recommendations online

**Access**
Track grant and gift history, change investment options, view statements, and manage your account online

**WHY CHOOSE THE GIFT FUND**

<table>
<thead>
<tr>
<th>Simple</th>
<th>Flexible</th>
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<tbody>
<tr>
<td>• Easy to establish</td>
<td>• Offers a variety of investment options, including ESG strategies</td>
</tr>
<tr>
<td>• Offers robust online capabilities</td>
<td>• Accepts complex assets</td>
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<tr>
<td>• Streamlines tax documentation</td>
<td>• Grant to most IRS-qualified charities</td>
</tr>
</tbody>
</table>

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<tr>
<th>Tax Efficient</th>
<th>Impactful</th>
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</thead>
<tbody>
<tr>
<td>• Gifts may be eligible for income tax deduction</td>
<td>• Integrates philanthropy into wealth planning</td>
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<tr>
<td>• Gifts of appreciated securities can offset capital gains taxes</td>
<td>• Enables you to share family values with future generations</td>
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<tr>
<td>• Assets in the fund grow tax-free</td>
<td>• Provides the framework to build a family legacy</td>
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</tbody>
</table>

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\(^1\) The BNY Mellon Charitable Gift Fund is a public charity as described in the Sections 501(c)(3), 509(a)(1) and 170 (b)(1)(A)(vi) of the Internal Revenue Code of 1986 ("the Code"), as amended, and is eligible to receive tax-deductible charitable contributions under Section 170(c).

\(^2\) Administration and investment management for the Gift Fund and its underlying accounts are provided through service agreements with BNY Mellon, N.A. BNY Mellon, N.A. makes available investment products to the Gift Fund that are sponsored, distributed, or provided by companies that are affiliates of BNY Mellon, N.A.
BNY MELLON CHARITABLE GIFT FUND DETAILS

Contribute

- Minimum Initial Contribution: $10,000
- Minimum Additional Contributions: $250

Grant

- Minimum Grant: $250
- Maximum Grant: Unlimited (up to account balance)
- Anonymous Grants: Yes

Invest

Investment Strategies

- Cash Reserve
- Maximum Income
- Income
- Growth & Income
- Growth
- Aggressive Growth

ESG Investment Strategies

These pools invest in managers that consider environmental, social and governance issues (ESG) in their investment process

- ESG Maximum Income
- ESG Income
- ESG Growth & Income
- ESG Growth
- ESG Aggressive Growth

For funds with assets greater than $3 million, individual securities can be selected to align with philanthropic objectives

HOW TO GET STARTED

Information about opening an account is available at bnymelloncharitablegiftfund.org or by contacting the Gift Fund at 888-213-7605 or bnymcharitable@bnymellon.com. Before participating in the Gift Fund, you should consult with your personal tax or legal advisor.

ABOUT THE BNY MELLON CHARITABLE GIFT FUND

The Gift Fund was established in 2013 to provide donors with a structured means to express their philanthropic values and priorities to family members and the community. Since that time, the Gift Fund has distributed more than $60 million to over 2,000 charities.

Contact Us

- 888.213.7605
- bnymcharitable@bnymellon.com
- bnymelloncharitablegiftfund.org

bnymelloncharitablegiftfund.org

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