



Matching Gifts Program Guidelines

Overview

BlackRock sponsors a global Matching Gift Program to encourage employees to make charitable giving a part of their lives and support their efforts to make a difference in the lives of others. Through the program, BlackRock supports charitable organizations that work to improve the lives of others through education, health and human services, environmental protection and the arts.

Employees can contribute in various currencies and the firm will match individual contributions that are equivalent to at least US\$50, up to an annual total of US\$5,000 per employee (exact amounts vary by currency). To be eligible for a matching gift, an organization must meet certain criteria (see Eligible Organizations below).

BlackRock's Matching Gift Program is managed by The JK Group, an independent administrator that manages matching gift programs for a number of financial services companies.

Using the Program. The first time you log into this secure site, you will be asked to create a password in order to access a personal matching gift page and request a match. **Match requests must be received within 90 days of your initial contribution.** Your matching contributions will be registered on the matching gift web page so that you can monitor the status of your requests and track how much money you have given each year, and to which organizations.

More details on the program are available in the Frequently-Asked Questions section of this site. If you have other questions or want to share feedback on the BlackRock Matching Gift Program, please contact the program's customer service team, available from 9 am to 6 pm (Eastern time) at 866-605-5408 or via email at BlackRock@easymatch.com.

Eligible Organizations

BlackRock's Matching Gift Program supports employee contributions to organizations in four categories. They are:

- **Education**
Covers gifts to degree-granting colleges and universities; independent college funds; and pre-kindergarten, private elementary, secondary and special education schools that have been accredited or approved by an appropriate professional or specialized accrediting body.

- **Health and Human Services**
Organizations that promote or provide a broad range of social, human or medical services to individuals or families. Organizations may include organizations that provide relief to victims of disasters, accredited hospitals, hospice care, homeless shelters, youth services and medical research.
- **Environmental**
Organizations that focus on the preservation and protection of the environment, protection of wildlife, pets or specialty animals. This includes pollution control, conservation, protection of natural resources (land, water, plant and energy), humane societies and veterinary services.
- **Arts and Culture**
Supports non-profit arts and/or cultural organizations primarily focused on activities that are open to and operated for the benefit of the general public.

In addition to meeting the Firm's criteria for eligible organizations, these organizations must be recognized as non-profit, tax exempt organizations by the appropriate local governing body. [For example, in the U.S., this is the Internal Revenue Service, which dictates what organizations are eligible under IRC §501c(3)].

BlackRock will not match gifts for the following types of contributions and/or organizations:

- Religious, political or other sectarian organizations
- Personal or family foundations
- Dues payable to national or local alumni groups
- Tickets to athletic, cultural or social events, luncheons or dinners
- Civic organizations (e.g., a local fire department)
- Memberships
- Bequests and insurance premiums
- Building Funds
- Payments for tuition, books or other special fees
- Subscription fees for publications
- Student exchange programs, fellowship programs, educational seminars
- Contributions in support of athletic programs
- Gifts made by spouses or partners of employees

- Gifts intended to fulfill a person's pledges, tithes or other religiously-related financial commitments
- Gifts to fraternities or sororities
- Walk-a-thon sponsorships given to participant

*The above information is provided as a summary.
Interpretation of policy is made at the discretion of
the firm by the Human Resources Department.
BlackRock reserves the right to modify, amend or
terminate any of its policies and/or employee
benefit programs at any time for any reason.*