

## Corporate Actions

# Election Agent Services



### Election Agent Services

Mellon Investor Services offers both Election Agent and Information Agent services for mergers and acquisitions. These services help ensure accurate and timely processing of the election and stock and cash payments.

### Related Services

- Information Agent
- Solicitation Agent
- Printing and Logistics
- Plan Tabulations
- Communications



**Mellon**

A Wealth of Solutions<sup>SM</sup>

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Sales 888.647.8889

### Regional Offices

Atlanta, Chicago, Dallas, Hartford,  
Los Angeles, New York, Pittsburgh,  
San Francisco, Seattle, St. Louis

Mellon Investor Services provides invaluable services to clients in managing cash/stock elections. As Election Agent, Mellon Investor Services assumes responsibility for producing the election forms and letters of transmittal, reviewing the returned certificates and forms, recording election choices, tabulating the election and performing any required proration calculations. Additionally, Mellon Investor Services processes cash and stock payments according to election and proration requirements and helps ensure that all taxes are reported properly.

As Information Agent, Mellon Investor Services provides experienced call center representatives who are trained in the specific details of each event. These representatives are knowledgeable in the terms of the transaction and experienced in all other transfer agent and corporate action systems, allowing them to handle each shareholder inquiry in one phone call. We also provide multiple channels for shareholder inquiries and responses including dedicated toll-free information phone lines, an e-mail inquiry system and a flexible Interactive Voice Response system.

Mellon Investor Services also has experienced communications specialists to assist in the crafting and delivery of tailored messages to shareholders, employees and the investment community. We can also provide media placement of public announcements and printing and logistics services with full SEC EDGAR filing capabilities.

### Client Benefits

- *Quality* ~ Mellon Investor Services has repeatedly been ranked first among its peers in Group Five, Inc. quality surveys.
- *Multiple Service Ability* ~ Mellon Investor Services is the only agent capable of acting as both the Election Agent and Information Agent.
- *Outstanding Processing System* ~ Mellon Investor Services' state-of-the-art processing system has an election module which quickly and accurately manages the election process. It has the power to handle the complexity of physical and book shareholders and dividend reinvestment plans.
- *Employee Plan Inclusion* ~ Mellon Investor Services can include 401(k), ESPP and ESOP plan participants in an Election Offer.
- *Experience* ~ Mellon Investor Services has more experience with cash-stock elections than any other agent.