

Shareholder Services

Investor Services Program

Attracting and Retaining Long-Term Investors

Attracting new investors and retaining them *for the long term* is a key element to financial stability and growth. Mellon Investor Services understands the importance of committed, loyal investors. In fact, we have created an Investor Services Program specifically to address this need. It is just one of many programs that have made us a leading provider of innovative and specialized features for Investor Services Programs.

What is the Investor Services Program?

Mellon's Investor Services Program is a comprehensive, direct stock purchase plan (DSPP) designed to meet the goals of both dividend-paying and nondividend-paying companies. The program provides easy-to-use, cost-effective investment services for shareholders and helps companies attract new investors and retain those already in place.

Stock Purchase Plan Options

Mellon's Investor Services Program conforms to the latest SEC regulations and provides several options that can either be sponsored by the company or by Mellon Bank, N.A., an affiliate of Mellon Investor Services.

- For corporations seeking to implement a stock purchase plan quickly, we offer a bank-sponsored, open-enrollment, Direct Stock Purchase Plan (DSPP).
- For corporations that have capital raising requirements or specialized solicitation needs, we offer and administer a prospectus-based plan.

Custom features of these plans include full and partial reinvestment of dividends, optional cash purchases submitted by check, scheduled or individual direct debits, convenient sales, full transfer capabilities, book-entry record keeping, Internet access to accounts, Internet transaction processing and complete transaction reporting. Additionally, the minimum and maximum investment levels can be customized during program design, as well as whether program fees are to be company or shareholder paid.

Mellon Investor Services can work with you to develop a custom program that meets your objectives. Our Product Management Team has the knowledge and industry experience to provide insight and direction. The Printing and Logistics Group can provide complete printing, packaging and delivery support. Mellon's comprehensive suite of shareholder services ensures seamless implementation and ongoing support of your program.



Investor Services Program

Mellon's Investor Services Program is a cost-effective program developed to help your company attract and retain long-term investors.

Related Services

- DividendReinvestDIRECTSM
- Direct Equity
- Employee Stock Purchase Plan
- Printing and Logistics
- StockWatch



Mellon

A Wealth of SolutionsSM

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Regional Offices

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

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Business Benefits

- *Increased Loyalty* ~ Direct Stock Purchase Plans foster stable, long-term investor ownership, shareholder loyalty and reduced trading volatility.
- *Increased Capital* ~ Registered Direct Stock Purchase Plans provide a cost-effective way to raise capital and instill brand loyalty in the products and services you offer.
- *Easy Implementation* ~ Our Investor Services Program is quick and easy to implement and it has the tools required to meet industry specifications and client needs.
- *Payment Flexibility* ~ Plan administrative fees can be paid by the company, by the participating shareholders, or a combination of the two – whichever meets your goals.
- *Cost-Effectiveness* ~ Shareholder “self-service,” shareholder-paid fees, potential for Mellon Investor Services’ proprietary DividendReinvestDIRECT Service and Web-based fulfillment and enrollment all contribute to the cost-effectiveness of our Investor Services Program.

Shareholder Benefits

- *Cost Savings* ~ A low-cost initial purchase with additional purchases of shares in convenient whole dollar amounts, supports the dollar cost averaging method of investing.
- *Increased Purchasing Power* ~ Full and fractional share investing and reinvestment of dividends increase the flexibility of individual investors. Our Investor Services Program is a cost-effective way to acquire shares and make additional investments separate from mutual funds, brokerage services and “synthetic” investment plans offered by some e-brokers.
- *Purchasing Flexibility* ~ Purchases can be made by check or by monthly or one-time debits from a bank account. Purchases can also be made through automatic payroll deductions, a source of purchase funds for employees.
- *Easy Account Access* ~ Mellon’s state-of-the-art Web-enabled “self-service” tool, Investor ServiceDIRECT®, is available for investors 24 hours a day, seven days a week. Investors can also opt for paper-based fulfillment, enrollment and account management.