



THREE SIMPLE WAYS TO DONATE APPRECIATED SECURITIES

By Phone

- 1 If your broker or bank holds your securities, call your broker and tell them which securities you wish to donate to The Columbus Foundation. (Most firms require written instructions.) Have your broker contact:

JEFFREY S. CULLMAN
 UBS Financial Services, Inc.
 The Cullman/Holt Group

5007 Horizons Drive, Suite 200
 Columbus, OH 43220
T 614/460-6541
F 855/423-3905

An arrangement can be made to have your broker transfer the securities by wire. Please use DTC number 0221 for the benefit of The Columbus Foundation, account #CM 82341 27.

- 2 If your broker prefers to transfer commonly traded securities, have them contact a Donor Services advisor at The Columbus Foundation at 614/251-4000. The broker can transfer the securities by wire to Charles Schwab. Please use DTC number 0164 for the benefit of The Columbus Foundation, account #2444-9948.
- 3 On the same day you call your broker, please confirm your instructions in writing to your broker and state your desire to make a gift to The Columbus Foundation. Please include the number of shares, the name(s) of the stock(s), and the purpose for which you are designating your gift (for example, an addition to the Upper Arlington Education Foundation Fund). In your letter, include your broker’s phone number and *send a copy of your letter to The Columbus Foundation* (address at the end of this document).

By Mail

- 1 Send your *unendorsed* stock certificate(s) by registered mail to The Columbus Foundation.
- 2 In a separate envelope, by regular mail, send to the same address:
 - A. A signed stock power (one power for each certificate; complete the signature block only). Stock powers are available from your broker, your bank, or The Columbus Foundation.
 - B. A brief note identifying yourself (name, address, phone number) and the number of shares, the name(s) of the stock(s), and the purpose for which you are directing your gift.
- 3 Mail *both* envelopes on the same day. The “date of gift” is determined by the later postmark.

By Hand

- 1 Bring your unendorsed stock certificate(s) to The Columbus Foundation. Sign a stock power (one power for each certificate; complete the signature block only). You should receive a receipt acknowledging your gift and its purpose. The “date of gift” is the date you deliver the securities.

