

Stock Gifts

Making gifts of appreciated stock is very easy. If you have any questions regarding this process, please call Kyle Markle or Ellen Rogier at Donaldson Capital Management at (812) 402-7289 or email kmarkle@dcmol.com.

The value of your gift will be based on the median value (average of high price and low price) on the date of your gift (day they are received in our account if wired or the postmark date on the envelope for stock certificates).

We will sell all shares transferred into our account as soon as possible, unless directed otherwise.

Electronic Transfer of Stock

If the stock you plan to gift is held in a brokerage account, you may have it transferred directly into our account.

1. The transfer will need to be initiated by your broker/financial representative. We have a *Sample Letter to Gift Stock* available that you can use to get the process started. This letter contains all of the information your financial representative will need to transfer the stock(s) directly into our account.

If you choose to notify your broker/financial representative in another way, the information they need is below.

Charles Schwab
DTC Participant # 0164
For further credit to Account 5309-8249
United Methodist Youth Home
TIN: 31-0951608

2. Once you have contacted your financial representative with instructions to transfer stock to our account, please fax or mail a copy of the letter to us so that we know to be on the lookout for the securities to arrive in the account. You can also email a confirmation to us with the details of the gift.