



STOCK DONATION INSTRUCTIONS

Step 1: Instruct your investment firm that you wish to donate by Electronic Transfer by selecting the appropriate option below (only check 1 box) and completing the form:

☐ **Individual Gift Donation:**

I, _____ (*your name*), would like to gift _____ (*# of shares*) of _____ (*stock/mutual fund symbol*) for the account of Friends of Sycamore House, Inc. (Tax ID: 85-1614307, Pershing/Brokerage Account #QG9092401, DTC: 0443) as a financial gift.

Donor Signature: _____ Date: _____

Donor Address: _____

Donor Account #: _____

☐ **Estate Gift Donation:**

I, _____ (*your name*), am the Executor/Executrix of the Estate of _____ (*name of the Estate*), and I would like to send _____ (*# of shares*) of _____ (*stock/mutual fund symbol*) for the account of Friends of Sycamore House, Inc. (Tax ID: 85-1614307, Pershing/Brokerage Account #QG9092401, DTC: 0443) due to inheritance.

Donor Signature: _____ Date: _____

Donor Address: _____

Donor Account #: _____

Step 2: Notify Friends of Sycamore House

To ensure proper crediting of your stock donation, please have your broker or yourself contact Mark McEathron at (809) 707-8086 or via email at mark.mceathron7@gmail.com to notify us that the transfer is underway.

Be prepared to provide the following information:

- Date of stock transfer
- Number of shares
- Name of stock
- Your name, email address, and mailing address

Acknowledgement will be made in compliance with IRS regulations by Friends of Sycamore House. The legal gift date for securities electronically transferred is the day they are received in our account.