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Please let us know when you have transferred securities to our account so that we can verify receipt of the securities and acknowledge your gift promptly. Contact Heather Klein Olson, Vice President for Advancement, at 800.762.6748 or [heather@weraise.org](mailto:heather@weraise.org).

#### STOCK DONATION PROCEDURES

In order to minimize the time and effort of donations of book entry, mutual fund, physical stock and bond certificates, we suggest the following process for donations to We Raise Foundation.

**Book Entry:** Securities that are held in book entry can be electronically delivered to We Raise Foundation using the following Depository Trust Company (DTC) delivery instructions:

*BMO Harris Bank  
DTC #992  
Re: We Raise Foundation  
Account #71-H110-AC-3  
"Donor Name"*

When directing your broker to deliver securities via DTC, please instruct them to contact our custodian at BMO Harris prior to delivery. Our contact is Meaghan Ryan, Vice President Client Relationship Management, 312.461.3633.

**Mutual Funds:** When directing your broker to transfer mutual fund shares, please instruct them to contact our custodian at BMO Harris prior to transfer. Our contact is Meaghan Ryan, Vice President Client Relationship Management, 312.461.3633.

For mutual fund transfers, it is advised that you (the donor) write a short letter to initiate the gift transfer. This letter should include your account information, be signed by you, as well as include a medallion signature guarantee. A medallion signature guarantee is a special signature guarantee for the transfer of securities—it's similar to a notary, but for financial institutions. Your primary banking institution can provide the medallion signature guarantee on your initiating letter.

**Physical Stock and Bond Certificates:** For physical stock certificate donations, send a copy of the certificate (front and back) before acceptance to Marion Miles at BMO Harris. Marion can be reached at 414.287.8824 or [marion.miles@bmo.com](mailto:marion.miles@bmo.com). She will check on the stock to make sure it is free of restrictions, and that the portfolio manager can work with the stock. Once she indicates that it is good to accept, she will give instructions on how the transfer can be made to We Raise Foundation.

**Valuation of Gift:** Book entry donations are valued on the date of receipt in our account and are based on the HI and LO average for that day. If the stock is physical and the stock is re-registered in the name of We Raise Foundation, the date on the certificate is used. If the stock is signed over to We Raise Foundation and mailed, the postmark date is used. Mutual fund shares will be valued at the net asset value on the day of transfer.