



One Pierce Place, Suite 250E, Itasca, IL 60143-2634
Phone: Toll-free 800.762.6748 or 630.766.9066 Fax: 630.766.9622

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.

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:

*Charles Schwab & Co., Inc.
DTC #0164
Account Name: We Raise Foundation
Account Number: 7096-5761
"Donor Name"*

If your broker has questions when delivering securities via DTC, please instruct them to contact our custodian, Charles Schwab, at 602.355.9003.

Mutual Funds: When directing your broker to transfer mutual fund shares, please instruct them to contact our custodian, Charles Schwab, at 602.355.9003. Please be sure your broker confirms the BIN number for mutual fund transfers with Charles Schwab prior to delivery. All deliveries must reference the We Raise Foundation and account number 7096-5761.

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, please contact Joe Scime from DiMeo Schneider at 312.853.1000 ext. 4109 to coordinate the process of transferring the physical stock certificates.

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.