



DREAM IT. FUND IT.

## TRANSFERRING STOCKS and SECURITIES

If you have owned stocks or bonds for more than one year that have appreciated in value you may realize even greater tax benefits than making a cash gift to LiftFund. It is LiftFund's policy to immediately sell transfers of stocks/securities.

Stock held with a brokerage firm or bank trust department can be transferred directly from the custodian firm or financial institution to LiftFund's account at Raymond James Financial.

You should instruct the holding institution to make a direct transfer, known as a "DTC", with the following instructions:

- **Please deliver** *[insert #]* **shares of** *[insert stock name and symbol]* **from my account with** *[insert brokerage firm name]*, **account number** *[insert account number]* **to:**
  - **Raymond James Depository Transfer Number (DTC):** 0725
  - **Account Name:** LiftFund
  - **LiftFund's Account Number with Raymond James:** 58691911
  - **Raymond James Contact:**
    - J. Patrick (Pat) Wofford
    - pat.wofford@raymondjames.com
    - (210) 403-8513

**NOTE:** Please immediately notify LiftFund's Development Office at the contact information below regarding the transfer of stocks/securities, the name of the stock/security, the number of shares transferred, and how you would like your donation to be used. This will allow LiftFund to acknowledge your donation with appropriate tax documentation.

**Donor Support:** (888) 215-2373 and Press 6 for Donations and Investments

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