



## INSTRUCTIONS FOR DONATING STOCK AND MUTUAL FUNDS TO MCCUTCHANVILLE GREENWAY PARK & NATURE PRESERVE

We appreciate your support of McCutchanville Greenway Park & Nature Preserve. We use a single account to streamline the gifting process, keep gift processing expenses low, and ensure an IRS-approved acknowledgement. To process your contribution in a timely and efficient manner, please follow the process below to contribute publicly traded securities, such as stock or mutual funds, through your brokerage account.

*If you have any questions, please contact Jessica Klostermann, Director Client Services at Donaldson Capital Management  
[jklostermann@dcmol.com](mailto:jklostermann@dcmol.com) – 812.402.7288 – Fax: 812.421.3214*

### **STEP 1: INITIAL THE TRANSFER WITH YOUR BROKER**

To transfer stock or mutual funds that are being held electronically, please use the Letter of Authorization (LOA) on the following page and instructions below. It is essential that you also contact your financial institution to obtain the required procedures and forms, and to provide them with the delivery instructions below. Include the donor's name on all deliveries.

*Deliver all DTC Eligible Securities to:*  
Clearing Firm: **Charles Schwab & Co, Inc.**  
Tax ID Number: **94-1737782**  
DTC Clearing: **0164**

For the account of: **McCutchanville Greenway Park & Nature Preserve**  
Account Number: **5651-7568**

*Note: Some financial institutions and mutual fund companies require their own form or an additional letter of instruction. If you are transferring mutual funds, please check with your broker to see if the funds are transferable.*

### **STEP 2: NOTIFY MCCUTCHANVILLE GREENWAY PARK ABOUT YOUR TRANSFER – VERY IMPORTANT**

If McCutchanville Greenway Park & Nature Preserve is not informed of the details of your transfer, your gift acknowledgement cannot be generated and will be delayed until we hear from you. The stock does not come to McCutchanville Greenway Park & Nature Preserve with information about the donor. Therefore, please send a copy of your Letter of Authorization (LOA) in the following manner so that they are aware of your gift and designation instructions:

**Mail:** Donaldson Capital Management, Attn: Jessica Klostermann, 20 NW First Street, 5<sup>th</sup> Floor, Evansville, IN 47708  
**Email:** Jessica Klostermann, Director Client Services – [jklostermann@dcmol.com](mailto:jklostermann@dcmol.com)  
**Phone:** Jessica Klostermann: 812.402.7288 **Fax:** 812.421.3214

### **STEP 3: CONFIRM YOUR TRANSFER**

**Your financial advisor or broker must initiate transfers.** Please confirm with your broker or advisor that your gift has been transferred from your account to McCutchanville Greenway Park & Nature Preserve and that McCutchanville Greenway Park & Nature Preserve has been informed. Once received, it usually takes 5-7 business days for your transfer to be liquidated, settled, and posted.

**LETTER OF AUTHORIZATION**

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm. I understand that I must initiate this transfer with my broker. I intend to gift these stocks to McCutchanville Greenway Park & Nature Preserve for the benefit of (specific intention and desired gift amount(s):

If you have any questions or encounter any problems with this transfer, please contact me immediately at the phone number below. This gift is being contributed by the following individual(s)/entity:

\_\_\_\_\_  
**Donor Name(s)**

\_\_\_\_\_  
**Address**

**Phone**

**Email**

\_\_\_\_\_  
**Name of Delivering Broker, Address, and Phone Number**

**Anticipated Date of Transfer**

Please irrevocably transfer the following assets:

\_\_\_\_\_  
Description of Asset/Name of Security

Symbol \*\*Number of Shares

Approx. Value

\_\_\_\_\_  
Description of Asset/Name of Security

Symbol \*\*Number of Shares

Approx. Value

*Please initiate the transfer based on the number of shares and not the dollar value, since security values may fluctuate. Shares are to be transferred in kind and not liquidated.*

Please deliver these shares to the following:

Clearing Firm: **Charles Schwab & Co. Inc.**

DTC Clearing: **0164**

For the account of: **McCutchanville Greenway Park & Nature Preserve**

Account Number: **5651-7568**

**SIGNATURES**

This is my/our written authorization to irrevocably transfer ownership of the assets specified in this form to McCutchanville Greenway Park & Nature Preserve. I understand that any contribution, once accepted, represents an irrevocable contribution to McCutchanville Greenway Park & Nature Preserve and is not refundable to me for any reason.

\_\_\_\_\_  
Donor Full Name (Please Print)

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Donor 2 Full Name (Please Print)

\_\_\_\_\_  
Donor 2 Signature