

Gift of Stock to Ronald McDonald House Charities of Alabama, Inc.



Client Account Information

Account Name: Ronald McDonald House Endowment

Account Number: 1055001128

Administrator: Jennifer Foster, 205-264-5232

To transfer a gift of securities to the Ronald McDonald House Charities of Alabama, Inc., via the Depository Trust Company (DTC) the following steps should be followed:

1. Donor should notify the originating brokerage or investment company the following Depository Eligible Securities (DTC) instructions:

- DTC Information
 - SEI Private Trust Company #2663
 - Reference: Ronald McDonald House Endowment, Acct. #1055001128

For Mutual Funds: Please DO NOT establish an account at the mutual fund in the name of RONALD MCDONALD HOUSE. Please contact the bank prior to transferring a mutual fund.

- **Reference: RONALD MCDONALD HOUSE, Acct. #1055001128**

2. Donor should notify originating brokerage or investment company the following:

- Donor Name
- Number of Shares
- Company Name
- Originating Account Number
- Name on Account
- Date Transfer Should Be Executed

3. Donor should notify Ronald McDonald House Charities of Alabama, Inc., the following:

- Donor Name
- Number of Shares
- Company Name
- Address of Donor
- Expected Date of Transfer
- Originating Brokerage or Investment Company
- Purpose of Gift or Any Restrictions as to Use

Upon receipt, Ronald McDonald House Charities of Alabama, Inc., will acknowledge the gift and the value based on the average high and low of the security on the day of receipt.

- Bank Contact: Jennifer Foster, 205-264-5232
- Ronald McDonald House Charities of Alabama Contact: Kathy Moore, Director of Major Gifts & Planned Giving, 205-585-3747 or 205-638-7258, Kathy.moore@rmhca.org