



DTC Instructions – Donations of Securities

Thank you for your interest in donating to **The Laura Rosenberg Foundation** (Tax ID: 11-2582251). As your name may not transfer with the securities, **please notify** The LRF in advance of the transfer. We are grateful for your support and want to ensure that we are aware of your generosity and acknowledge you in a timely matter for income tax purposes.

STEP ONE:

Call Michael Rosenberg at The LRF at 516.282.6969 to alert us of your pending gift by providing the information below or send a copy of this form to info@laurarosenbergfoundation.org

Name of Donor: _____

Would you like to be recognized for your donation and listed publicly?

- Yes, please list me as: _____
- No, please make my donation anonymous

Phone Number: _____ Email: _____

Donor Address: _____

Name of Stock: _____ Number of Shares: _____

Broker Name and Number: _____ Date of Transfer: _____

Gift Designation, if Any: _____

STEP TWO:

If Using Electronic Transfer: Send the below information to your broker to complete the transfer:

Bank: Wells Fargo Advisors

DTC Number: 0141

FBO Account Name: Laura Rosenberg Foundation

Account Number: 7342-8915

Include donor name to further ensure your gift is properly acknowledged.

If Transferring By Mail: If you are in the *physical possession* of a stock certificate, use the following procedure:

- Draft and send a Letter of Authorization
- The signature of the person(s) named on the certificate(s) must be on the back of the certificate(s)
- LRF's account number (7342-8915) should be written on the face of the certificate(s)
- Send these documents by a tracked mail system for security purposes (i.e. Federal Express, Registered Mail, etc.) to our broker at the following address:

Mr. David Roberts
Wells Fargo Advisors
88 Froehlich Farm Blvd
Woodbury, NY 11797

Many employers have employee matching gift programs and will match your personal charitable donations. Ask your accounting or human resources department if you are eligible to increase the impact of your gift.