



## Gift of Stock to the Ronald McDonald House Charities of Greater Cincinnati

### Client Account Information:

**Account Name:** RONALD MCDONALD HOUSE  
**Account Number:** 0100 0979 4165  
**Administrator:** Helen Webb  
**Phone:** 513.534.3698  
**Fax:** 513.534.3526

### Security Cage Information:

**5/3 Bank Contact:** Helen Webb  
**Phone:** 513.534.3698  
**Fax:** 513.534.3526  
**Please contact the above individual prior to making any transactions.**

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

1. Donor should notify the originating brokerage or investment company the following DTC instructions:

#### **Depository Eligible Securities (DTC)**

**5/3 Bank # 2116**

**Reference: RONALD MCDONALD HOUSE, Acct. #0100 0979 4165**

*(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..)*

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 Greater Cincinnati the following:

Donor Name  
Number of Shares  
Company Name  
Name of Donor  
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 Greater Cincinnati will acknowledge the gift and the value based on the average high and low of the security on the day of receipt.

5/3 Bank Contact: Helen Webb, phone: 513.534.3698, fax: 513.534.3526

Ronald McDonald House Charities Contact: Michelle Steed, Chief Development Officer, 513.559.4620, mstead@rmhouse.org