

HOW TO MAKE A GIFT OF STOCK

Contact: Monica Wilton, Executive Director,
Eugene Public Library Foundation - 541- 338-7018 - mwilton@eplfoundation.org

Broker: Doug Bales, Whitewater Wealth 541-953-1442
doug@whitewaterwealth.com

You may transfer shares of stock, bonds or mutual fund positions to Eugene Public Library Foundation (EPLF) in one of two ways:

1. By electronic transfer (DTC) between your broker and EPLF's broker. This is the easiest and most efficient way to handle a stock transaction. **Please call to notify us of your intent to make a gift of stock** and provide us with the following information so that we may properly record and acknowledge your gift:

- Your broker's name and phone number
- The name of the stock and
- The number of shares you plan to transfer

Call or write your broker with the following information to facilitate the transfer:

LPL Financial, Attn: Custody Dept.

4707 Executive Drive

PO Box 502210

San Diego, CA 92150-2210

DTC #0075 Account Name: Eugene Public Library Foundation

Account Number: 8017-0888

2. Send stock certificate and a stock power to EPLF in separate envelopes.

For stock certificates registered in your name, we need the following items:

- A stock power assigning and transferring the stock to EPLF's stock brokerage
- Your signature on the stock power must match the name on the stock certificate.
- Each certificate must have a separate stock power. If you are uncertain how to fill out a stock power, a blank one with just your signature is sufficient.
- **Our broker can provide you with a blank form and offer any help you may need.**
- A letter from you addressed to our broker indicating the gift is being made to EPLF. Our broker's address is listed above.

While it is not required, we recommend you use registered mail.

Remember to send the certificate(s) and the stock power(s) in separate envelopes!

We look forward to receiving your gift. Thank you for your generosity!

