



How to Make a Gift of Stock or Appreciated Mutual Fund Shares

Thank you for your interest in making a gift of stock to Ryan's Case for Smiles. The following information can serve as a reference to both you and your stock broker.

Notify your broker of your wish to donate stock or appreciated mutual fund shares to Ryan's Case for Smiles — indicating the name of stock/fund and number of shares. Also, let your broker know the name of the Development Office contact at Ryan's Case for Smiles:

Cindy Kerr, Founder and CEO
610-247-1361
cindy@caseforsmiles.org

Once you have notified your broker of your intentions, Ryan's Case for Smiles is happy to work directly with your broker to facilitate the gift, if you prefer. Simply provide the broker's name and phone number and we will forward along instructions.

- When you have made your gift, please notify the Ryan's Case for Smiles by phone, mail or email, making note of the transfer date and the value on that day. Please note that we may not receive timely notification of your donation, so your direct notification is very much appreciated.
- We prefer not to open new brokerage accounts to facilitate this type of gift. If your broker cannot sell the stock or appreciated mutual fund shares in its street name without opening an account for Ryan's Case for Smiles we will ask your broker to process your gift in one of two ways:
 - Contact Morgan Stanley (DTC # 0015) to arrange an electronic transfer of the stock to the Ryan's Case for Smiles account (615026887).
 - Before wiring the transaction, your broker should contact Dan O'Neill's Office at Morgan Stanley at 1-973-425-8559 to **a)** notify him on what stock is coming and from where, **b)** to provide a DTC #, and **c)** to instruct Morgan Stanley to credit the stock to the Ryan's Case for Smiles Account #615026887.

OR

- The stock certificates can be transferred to Ryan's Case for Smiles and delivered to our office at the address indicated below. **YEAR-END TRANSFER NOTE:** *Your gift is not complete for tax purposes until the certificates are in our possession.*

Thank you for your support!

Ryan's Case for Smiles
Attn: Cindy Kerr
295 E. Swedesford Rd. #396
Wayne, PA 19087
Phone: 610-247-1361
Federal Tax ID# 86-1173750

