



Notification of Gift of Appreciated Stocks, Bonds, or Mutual Funds

Thank you for choosing to make a gift to the Morton Community Foundation! Please give the following information to your stockbroker to make a transfer of stock directly into the Morton Community Foundation's Schwab One Organization Account at Charles Schwab. For you to get the most favorable tax benefit, please do not sell the stock, and then give the proceeds to the Morton Community Foundation. Instead, transfer the stock directly to the MCF and we will liquidate it. Talk to your tax accountant or financial planner for more information about the benefits of direct donations of stock.

Name of Donor(s): _____

Donor Address: _____

Donor Phone #: _____

E-Mail Address: _____

Donor's Purpose for Gift Proceeds: _____

Name of Security & Ticker Symbol Being Donated: _____

Number of Shares: _____ Estimated Value per Share: _____

Estimated Date of Transfer: _____

Broker Name: _____

Broker's Institution: _____

Broker's Phone #: _____ Broker's E-Mail: _____

Per IRS regulations, the gift value is determined using the average of the high and low prices reported on the date the contribution is received by the Morton Community Foundation. If you have additional questions, please feel free to contact Community Foundation Executive Director Scott Witzig at 309-291-0434 or switzig@mortoncommunityfoundation.org. The Morton Community Foundation is a 501(c)(3) nonprofit. Federal tax identification number is 37-1397503.

OTC-Eligible Securities should be delivered to: Morton Community Foundation, Schwab Account: 6422-7533, OTC Clearing (DTC) is 0164, Code 40. All OTC deliveries MUST include our name and Schwab account number. The address for Charles Schwab Operations is: Regular Mail: PO Box 982600, El Paso, TX 79998-2600. FedEx/UPS/Overnight: 1945 Northwestern Drive, El Paso, TX 79912. Main Fax: 888-526-7252

WIRE-TRANSFERS DONATIONS TO THE MORTON COMMUNITY FOUNDATION

Wired funds should be delivered to: Citibank NA, 111 Wall Street, New York, NY 10005 ABA #: 021000089 FBO: Charles Schwab & Co., Inc. A/C #: 40553953 For further credit to Morton Community Foundation Account#: 6422-7533. All wires MUST include client name and Schwab account number.