

# STRATHMORE

## Making a Gift of Stock to Strathmore

Thank you for your interest in making a gift of stock to Strathmore. To execute your transfer, please follow the instructions below.

### Step One:

Please instruct your broker to transfer your stock contribution to Strathmore Hall Foundation's account. Your broker will need the following information regarding Strathmore's brokerage:

Chevy Chase Trust Company clearing through Reliance Trust Company

DTC #7381

Account #22-311181

Federal Tax Identification Number 52-1233092

Reference/Memo (this is critical information to include) This is a gift donation made by \_\_\_\_\_ (donor's name) and donated to Strathmore Hall Foundation, Inc.

Stock certificates can be mailed to:

Chevy Chase Trust

7501 Wisconsin Ave Ste 1500W

Bethesda, MD 20814

Contact: Michael Kleinschmidt

[mkleinschmidt@chevychasetrust.com](mailto:mkleinschmidt@chevychasetrust.com) – 240-497-5028

Alternate contact: Megan Nevius

[mnevius@chevychasetrust.com](mailto:mnevius@chevychasetrust.com) - 240-497-5081

### Step Two:

For us to identify your generous gift and issue a tax receipt, please be sure to inform us of your contribution. Privacy laws discourage brokerage firms from releasing the names of clients, making it a challenge on our end to acknowledge gifts.

Please mail or email a copy of your written instructions authorizing your broker to transfer your donation to Strathmore, including your intentions regarding the purpose of your contribution, to:

Erin Phillips, Strathmore

5301 Tuckerman Lane, N. Bethesda, MD 20852 — [ephillips@strathmore.org](mailto:ephillips@strathmore.org)

### Tax Considerations

The gift value of the securities is the average between the high and low prices, multiplied by the number of shares transferred, on the date one of the following occurs:

1. The securities are placed in an account in the name of Strathmore Hall Foundation;
2. The securities and stock powers are hand delivered or mailed (date of postmark) to Strathmore Hall Foundation.

For questions, please contact Erin Phillips, Director of Donor Engagement, at 301-581-5160 or [ephillips@strathmore.org](mailto:ephillips@strathmore.org).

Last Updated: May 2021