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: Melissa Mercurio
Mmercurio@chevychasetrust.com – 240.497.5082

Alternate contact: Megan Nevius
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

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.