

# STRATHMORE

## Stock Transfer Instructions

When it comes to making a difference, *what you give* may be just as important as *how much you give*. Donating stock is a tax-savvy form of philanthropy and a relatively simple process that enables you to make a greater impact with your charitable contribution while reducing your tax burden.

### Step One:

After consulting with your tax or financial professional\*, please provide your broker with the following instructions to initiate an electronic transfer:

**DTC ID:** 7381

**Account Number:** 22-311181

**Account Name:** Strathmore Hall Foundation

**Tax ID/EIN:** 52-1233092

**Receiving Institution:**

Chevy Chase Trust Company clearing through Reliance Trust Company  
7501 Wisconsin Ave Ste 1500W, Bethesda, MD 20814

### Step Two:

When you make a gift to Strathmore using the transfer information above, we often do not receive any information that identifies you as the donor.

To ensure that you receive a proper tax acknowledgement of your gift, **please let us know!**

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### Tax Considerations

To be eligible for a charitable deduction for a specific tax year, your gift is complete on the date the shares are received into Strathmore's account.

Execution of securities transfers is not instantaneous and can take several weeks to process. Please plan accordingly during busy times, such as the end of the calendar year.

*Thank you!*

\*Strathmore Hall Foundation does not provide tax, legal, or accounting advice. Always consult a financial professional to determine your tax benefits that may result from donating stock to a nonprofit organization.