

Mary R. Alexander
Director of Development
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Electronic Stock Transfer Instructions

Thank you for your interest in supporting Lindner Center of HOPE through a stock donation. Appreciated securities are perhaps the most cost-effective assets to use in making a gift. When you transfer ownership of long-term holdings to Lindner Center of HOPE you receive a charitable deduction for their fair market value — and you incur no capital gains tax (subject to IRS deduction limits).

Because electronic transfers are made without identifying the donor, please alert us in advance about the stock and number of shares you plan to give. That way we can send you a tax receipt for your donation. You can do so by emailing Lindner Center of HOPE Development Director, Mary Alexander:
mary.alexander@lindnercenter.org

According to IRS regulations, the date of your gift corresponds to the date it arrives in our possession (for transfers from brokerage account to brokerage account).

This is the information necessary to transfer stock to our account:

Account: WLB 0934

DTC #: 0221

Broker: UBS Financial Services Inc.
8044 Montgomery Rd. 200W
Cincinnati, OH 45236

John T. Lawrence IV
tharp.lawrence@ubs.com
Vice President – Wealth Management
P: 513-792-2138
F: 855-395-4974

Adam Schmidt
adam-g.schmidt@ubs.com
Wealth Strategy Associate
P: 513-792-2127
F: 855-395-4974

Information needed to properly record gifts:

- Number of shares donated to Lindner Center of HOPE
- Name of the company stock that is being transferred
- Restriction/designation for your gift

THANK YOU FOR SUPPORTING LINDNER CENTER OF HOPE!