



**Tax ID: 13-4343743**

Mary R. Alexander  
Sr. Director of Development  
4075 Old Western Row Rd.  
Mason, Ohio 45040  
513-536-0317  
[mary.alexander@lindnercenter.org](mailto:mary.alexander@lindnercenter.org)

### **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's Development Director, Mary Alexander: [mary.alexander@lindnercenter.org](mailto: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](mailto:tharp.lawrence@ubs.com)  
Vice President – Wealth Management  
P: 513-792-2138  
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!**