

## Donation Transfer Instructions



### ELECTRONIC GIFTS OF STOCK:

Electronic gifts may be made through the Taft Museum of Art trust account. Most stocks are cleared through the Depository Trust Company (DTC). To make an electronic stock transfer, the donor will need the following information:

DTC 2116  
Fifth Third Bank  
For further credit to: Taft Museum of Art  
Account Number: 010004305520  
Gift Donated from (have broker include the individual's name)  
Attention: Peter Aamodt (513) 352-5148

Please contact Peter Aamodt at (513) 352-5148 or e-mail at [paamodt@taftmuseum.org](mailto:paamodt@taftmuseum.org) for assistance in advance of any stock gifts. (If we are not notified in advance, the gift may be rejected for lack of proper identification.)

### PHYSICAL STOCK CERTIFICATES:

Physical stock gifts can be made with the proper paperwork. *If the certificate is in the donor's name*, they should sign it on the back (use the exact same name as on the certificate) or, preferably, sign a blank stock power. (A stock certificate signed on the back is negotiable.)

*If the certificate is in the name of your organization*, you will need to provide us with a signed corporate resolution and a signed stock power to deposit it in the account. Different people must sign the two documents. (The corporate resolution identifies who is authorized by the board to sign legal documents, such as stock powers.) Please contact Peter Aamodt at (513) 352-5148 for further information on physical stock certificates.

When mailing, the certificate should be sent in one envelope and the stock power and corporate resolution should be sent in a separate envelope.

### MUTUAL FUNDS:

Shares in some open-ended mutual funds can be received as gifts. The process is unique to each mutual fund and can take several weeks. Since every mutual fund operates a little differently, please call Peter Aamodt at (513) 352-5148 to transfer mutual fund gifts to your trust account.

For more information, please contact:

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