



# THREE SIMPLE WAYS TO DONATE APPRECIATED SECURITIES

## By Phone

- 1 If your broker or bank holds your securities, call your broker and tell him/her which securities you wish to donate to The Columbus Foundation. (Most firms require written instructions.) Have your broker contact:

**W. ARTHUR CULLMAN, JR. OR** 5007 Horizons Drive, Suite 200  
**JEFFREY S. CULLMAN** Columbus, OH 43220

UBS Financial Services, Inc. **T** 614/460-6550  
 The Cullman Investment Group **F** 614/460-6575

He can arrange to have your broker transfer the securities by wire. Please use DTC number 0221 for the benefit of The Columbus Foundation, account #CM 82341 27.

- 2 On the same day you call your broker, please confirm your instructions in writing to your broker and state your desire to make a gift to The Columbus Foundation, including the number of shares, the name(s) of the stock(s), and the purpose for which you are designating your gift (for example, an addition to the Upper Arlington Education Foundation Fund). In your letter, include your broker’s phone number and *send a copy of your letter to The Columbus Foundation* (address at the end of this document).

## By Mail

- 1 Send your *unendorsed* stock certificate(s) by registered mail to The Columbus Foundation.
- 2 In a separate envelope, by regular mail, send to the same address:
  - A. A signed stock power (one power for each certificate; complete the signature block only). Stock powers are available from your broker, your bank, or The Columbus Foundation.
  - B. A brief note identifying yourself (name, address, phone number) and the number of shares, the name(s) of the stock(s) and the purpose for which you are directing your gift.
- 3 Mail *both* envelopes on the same day. The “date of gift” is determined by the later postmark.

## By Hand

- 1 Bring your unendorsed stock certificate(s) to The Columbus Foundation. Sign a stock power (one power for each certificate; complete the signature block only.) You should receive a receipt acknowledging your gift and its purpose. The “date of gift” is the date you deliver the securities.

