

ALBERTINA KERR

Stock Donation Instructions

Thank you for your interest in making a stock donation to Albertina Kerr. The following is the information that your brokerage firm will need in order to make the stock transfer.

Account Name: Albertina Kerr Foundation - Endowment

Clearing Firm: U.S. Bank

Account Number: 080018589000

DTC: 2803

Albertina Kerr Brokerage Contact Name: Rebecca Bibleheimer, JD LLM

Phone: 503.464.4909

Attached you will find a request template that you can complete and copy onto your letterhead to fax or scan to your broker. Please notify Chris Canter at Albertina Kerr (phone: (503) 262-0188, or email Chris.canter@albertinakerr.org) when you have requested the stock transfer. Once we have received the transfer, we will promptly acknowledge receipt of your gift

If you should ever have any questions about this process, need additional information or further assistance, please contact us.

With gratitude,



Christiaan L. Canter
Director of Individual and Planned Giving
Chris.canter@albertinakerr.org
503.262.0188

Stock Transfer Request

Date: _____

From: _____ (Donor's Name)

To: _____ (Your Brokerage Firm)

Attention: _____ (Broker Name)

Fax Number: _____ (Broker's Fax)

Please transfer _____ (# SHARES) of _____ (STOCK NAME)

From my account # _____

To the following account:

Account Name: Albertina Kerr Center Foundation

Broker: U.S. Bank

Account Number: 080018589000

DTC: 2803

Albertina Kerr Brokerage Contact Name: Rebecca Bibleheimer, JD LLM

Phone: 503.464.4909

This is a stock gift. If you have any questions, please contact me.

Sincerely,

_____ (Donor's Signature)

_____ (Donor's Address)

_____ (email or phone number)