

HOW TO TRANSFER GIFTS OF STOCK TO THE SEVEN HILLS SCHOOL

Electronic Gifts of Stock:

Most brokers or agents can wire gifts of stock directly to the school's account by using the information below:

Depository Trust Company Number **(DTC) 0226**
Organization to be sent: **Fifth Third Securities**
Account number to be referenced: **011-634344**

Prior to an electronic transfer, please have your representative contact one of our representatives at Fifth Third Securities:

Laura Tenley
Phone: 513-534-5537
Fax: 513-534-6672

The following information must be provided to the Fifth Third representative:

- *The gift is for The Seven Hills School*
- *Name and number of shares to be gifted*
- *Name of the donor*
- *Any specific designation for the gift*
- *Name of the agent that will be initiating the electronic transfer*

Please have your broker contact **Ann Brock or Margo Kirstein** in the **Development Office at The Seven Hills School** with the stock information as well. Send notice to 5400 Red Bank Road, Cincinnati, OH 45227, or call **(513) 728-2434** or **(513) 728-2430**.

Please be aware that it will take up to 7 days from the date of initiation of the transfer for a stock gift to settle in our account.

Physical Stock Certificates:

Ways to send physical stock certificates:

1. If the certificate is in the donor's name, he/she should complete the transfer form on the back of the certificate (use the name exactly as on the certificate) signing the certificate over to the School. Because a signed stock certificate is negotiable instrument a separate signed stock power is the preferred method of transfer. The certificate and stock power should be sent in separate envelopes to the address below.
2. Ask your broker or stock agent to issue a stock certificate in the name of The Seven Hills School. It takes approximately two to three weeks to have a certificate issued. The issuing agent can be instructed to send the stock directly to the School. Please have him reference your name as donor.

The Fifth Third Securities
Ms. Laura Tenley
38 Fountain Square Plaza/MD 1090X6
Cincinnati, OH 45263
(513) 534-5537

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Ann Brock/Development Office
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