



Procedures for Transmitting Gifts of Publicly Traded Securities to The Rotary Foundation – United States

Donors may transfer gifts of marketable securities to The Rotary Foundation either electronically or via a mailed certificate. **Please be sure to inform The Rotary Foundation of your intent to contribute securities.** Contact Gift Administration at The Rotary Foundation to receive credit and a tax receipt for your donation (contact information is at the bottom of this page).

Electronic Transfer

Contact your broker to transfer securities electronically directly to The Rotary Foundation's Merrill Lynch account. The information listed below is what you will need in order to complete your electronic transfer:

Account Name: **The Rotary Foundation of Rotary International**

Account Number: **695-04362**

DTC Number: **5198**

Broker: **Merrill Lynch**

Contact: **Steven H. Lowenthal**

Phone: **847/564-7240**

Certificate Transfer

Stock certificates may be transferred to The Rotary Foundation. **Please note that the process of transferring stock ownership in certificate form can take up to two weeks.** There are three ways to transfer stock certificates to The Rotary Foundation:

1. Certificate is made out to The Rotary Foundation.
2. Certificate is in donor name and the donor signs the certificate.
3. Certificate is in donor name (and unsigned) and is mailed under separate cover with a stock power form signed by the donor.

Gift Administration can provide further instructions depending on the form of your certificate transfer.

**Gift Administration
The Rotary Foundation
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201
Phone: 847/866-3380
Fax: 847/328-4101
Giftadministration@rotary.org**