



Ronald McDonald
House Charities®
Bay Area

Gifts via Stock and Wire: Transfer Instructions

For all stock gifts and wire transfers, please use the attached Ronald McDonald House Charities Bay Area Transfer Instruction Letter. **In order to properly acknowledge your gift and ensure the correct donor is credited for the gift, please notify us of the transfer.** Please state the purpose of your gift and an address to send a gift acknowledgement.

The value of your stock gift is determined by taking the mean of the high and the low value of the security on the day that it is credited to the RMHC Bay Area account or the day that the certificate is in the custody of the Charities with a gift letter and an executed stock power. If mailed through the U.S. Postal Service, the gift value is established on the date of the postmark. RMHC Bay Area's Federal Tax ID Number is 94-2538615.

Attached is a letter you may use to send directly to your broker or bank trust officer with your gifting instructions. If you wish to gift a stock certificate rather than have your bank or broker deliver the stock electronically, please have the certificate registered in the name of "Charles Schwab & Co., Inc. as custodian, fbo Ronald McDonald House Charities Bay Area", as specified on the attached form. **Please send or fax a copy of your transfer authorization to the Charities at the address below so we may expect your gift.**

If the certificate is registered in your name, send it to the Charities **unsigned**, along with a letter confirming the gift to RMHC Bay Area. You will want to include the specific purpose of the gift. Send a signed stock power in a separate envelope. Stock powers must be signed as the name(s) appear on the stock certificates.

Delivering or Mailing Certificates

VP, Finance
Ronald McDonald House Charities Bay Area
520 Sand Hill Road
Palo Alto, CA 94304
650.470.6009
650.470.6018 (fax)
cynthia.semenoff@rmhcbayarea.org

Asset Manager Contact

Maria Pyatigorsky
Wetherby Asset Management
417 Montgomery Street, Third Floor
San Francisco, CA 94104
415.399.9159
415.399.9330 (fax)
maria@wetherby.com



Ronald McDonald House Charities Bay Area Transfer Instruction Letter

***NOTE: In order to properly acknowledge your gift and ensure the correct donor is credited, please notify us of the transfer. ***

To: _____ (Broker or Bank Name & Contact)
 From: _____ (Donor Name & Address)

 Date: _____ (Current Date)
 Re: Account No. _____

Please accept this memo as your authorization to make a gift to **Ronald McDonald House Charities Bay Area (Tax ID # 94-2538615)** from my referenced account as soon as possible or on _____ (specify date). The specific purpose of my gift is _____.
 If you need to contact me or have questions regarding these instructions, my number is _____. Please deliver (check applicable boxes):

- _____ shares/units of _____ (specify stock or bond)
- Cash in the amount of \$ _____

Include my name in the transaction description on the delivery specified above.

Following are the delivery instructions:

Electronic Delivery

<p>Wire Transfer Instructions <i>All deliveries must include client name and Schwab account number.</i> Wire to: Citibank NA, 111 Wall Street, New York, NY 10043. ABA# 021000089 FBO: Charles Schwab & Co., Inc. A/C #: 40553953 For the Account of Schwab A/C # 3842-4248 F/F/C Client Name: Ronald McDonald House Charities Bay Area Gift Account</p>	<p>DTC Eligible Ronald McDonald House Charities Bay Area Gift Account # 3842-4248 Delivery to DTC Clearing 0164, Code 40</p>
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Physical Delivery

Please issue a physical certificate for the gift specified above registered as follows: **Charles Schwab & Co., Inc. as custodian, fbo Ronald McDonald House Charities Bay Area.** Send the certificate to: Charles Schwab & Co., Inc., Attn: Transfer of Accounts, PO Box 52013, Phoenix, AZ 85072. **Include a copy of this memo with the stock certificate.**

Mutual Fund Units

Please gift _____ units of _____ (mutual fund name).
 For re-registration instructions, contact Maria Pyatigorsky at 415.399.9159.

 Donor Signature(s)

 Date