

DONATING GIFTS OF STOCK TO ASSOCIATION HOUSE OF CHICAGO

Donors may transmit gifts of marketable securities to Association House of Chicago (AHC) through their broker. A letter of instruction or notice of transmittal like the one included, outlining the intended purpose of the gift, is appreciated. Privately held or other gifts of securities must be reviewed our broker prior to acceptance. **Please inform AHC of your intent to gift securities.** Giving stock gifts present high value to yourself: generally, you can avoid capital gains tax, and claim a tax-deductible portion of the amount on the date of transfer.

Through a Broker

Association House of Chicago has an account with RBC Wealth Management. Our broker, Tom Slivovsky, may transfer securities directly to our brokerage account using the following account information. The date securities are received in AHC's brokerage account is the date of the gift.

Within the United States:

DTC Eligible Securities

| | |
|-----------------|---|
| DTC Number | 0235 |
| Account Number | 312-00413 |
| Account Name | Association House of Chicago |
| Account Manager | Tom Slivovsky, <i>RBC Wealth Management</i> |
| Contact Info | 312.559.1716 |

NOTICE OF TRANSMITTAL OF GIFT OF SECURITIES

GIFTS OF STOCK TO ASSOCIATION HOUSE OF CHICAGO

The value of my gift is approximately \$_____.

I have notified my broker to wire transfer _____ shares of _____
stock. Company/Symbol

I would like to speak with someone about giving a stock gift. Please call me at:

We appreciate your unrestricted gift of stock! Which area of community support do you champion the most?

- | | |
|---|--|
| <input type="checkbox"/> Behavioral & Mental Health | <input type="checkbox"/> Helping Families to be Safer & Stronger |
| <input type="checkbox"/> Building a Competitive Workforce | <input type="checkbox"/> Better Educational Outcomes |
| <input type="checkbox"/> The greatest need | |

Name: _____

Address: _____

Phone: _____ Email: _____

Please mail, fax, or email your notice of transmittal form to:

Attn: Development Department
Association House of Chicago
1116 N. Kedzie Avenue
Chicago, IL 60651
Fax: 773.384.0560
Email: dwilliams@associationhouse.org