How to Donate Stock or Mutual Funds

William Temple House gratefully accepts gifts of stock and mutual funds to support our mission. Our policy is to sell gifts immediately upon receipt.

Please follow these instructions to ensure a smooth transfer:

- **First**, send a written confirmation to William Temple House documenting the **name of the securities and number of shares you intend to donate**. (Gifts made without restrictions are the most helpful to us; however, if you wish to restrict your gift to a specific program, please include that information.) This confirmation can be an email sent to development@williamtemple.org. **This correspondence from you is very important** since this will be the only way we can connect you, the donor, to the gift and enable us to provide you with a tax receipt.

- **Next**, instruct your broker to electronically transfer the securities to the William Temple House account at Merrill Lynch using the information below. **There is no cost to you for making this transfer.**

  Merrill Lynch **DTC participant number 8862**
  Account name: William Temple House
  Account number: 54F-02288
  Merrill Lynch contact:
  William Good
  4004 SW Kruse Way Place, Suite 100
  Lake Oswego, OR 97035-2477
  Phone: 503.699.7203 | 800.667.9346
  Fax: 503.946.3851
  Email: william_good@ml.com

Upon receipt of your gift, William Temple House will send you written documentation of the date and amount of securities received.

**Thank you for your support!** If you have any questions, please contact:

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