

## **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](mailto: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 Raymond James** using the information below. *There is no cost to you for making this transfer.*

Raymond James DTC participant #0725

Account name: William Temple House

Account number: 7774F626

Raymond James contact:

Jed Schlanger

5440 SW Westgate Dr, Ste 110

Portland, OR 97221-2439

Phone: 503.203.8585

Fax: 503.203.8590

Email: [Jed.Schlanger@RaymondJames.com](mailto:Jed.Schlanger@RaymondJames.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:

Terri Wiley, Director of Development & Marketing

William Temple House

2023 NW Hoyt St

Portland, OR 97209

Phone: 503.715.0238

Email: [twiley@williamtemple.org](mailto:twiley@williamtemple.org)