William Temple House

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 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

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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