

## **KAPPA DELTA RHO FOUNDATION INSTRUCTIONS – GIFTS OF STOCK**

Thank you for considering a gift of stock to the Kappa Delta Rho Foundation. The following information sets forth the procedures to follow to transfer the shares to the Foundation\*.

In order to transfer shares of stock to the Foundation, follow these simple steps\*\*:

Advise your broker to:

**Transfer \_\_\_\_ shares of XYZ Corporation shares via DTC (Depository Trust Company) into the Kappa Delta Rho Foundation account at Charles Schwab:**

**Charles Schwab  
DTC # 0164  
Credit Account # 4998-5491  
FBO Kappa Delta Rho Foundation**

**Please advise the Foundation if you are going to make such a contribution in advance.** If you, or your broker, have any questions regarding these instructions, contact the Director of Gift Planning & Development at 1-800-536-5371 ext. 115.

*\*If you wish to have your gift restricted and not made part of the annual fund, you must contact the Director of Gift Planning and Development at 1-800-536-5371 ext. 115, or by email at [foundation@kdr.com](mailto:foundation@kdr.com), to discuss the terms of your gift, before you make the transfer.*

*\*\*Please contact the Director of Gift Planning and Development at 1-800-536-5371 ext. 115, or by email at [foundation@kdr.com](mailto:foundation@kdr.com), if you hold the stock certificate and wish to make a donation. At that time, we will help you get the then-current procedures.*

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