**ROTARY CLUB OF TUCSON**

**Stock Donation Instructions**

**Dated 3.29.18**

**VERSION II**

# ***3 easy steps to donate stock to The Rotary Club of Tucson Foundation***

***1. Contact The Rotary Club of Tucson*** ***Charlotte Harris*** (or other RCTF Planned Giving Designated Individual)

* Inform them of your intent to donate stock.
* Discuss how you would like the donation designated.

Jo DeChatelet  
 (520) 891-5759  
 [jdechatelet@gmail.com](mailto:jdechatelet@gmail.com)

***2. Contact Receiving Brokerage Firm Merrill Lynch***  
 Merrill Lynch is the ***receiving*** Brokerage Firm and maintains the RCTF endowment accounts.

Judy Lewis CIMA®, CRPC® Derek J. Patla, CFP® (520) 747-6166, (800) 937-0651 Ext 166, (520) 747-6140  
 Fax 1-520-226-0164 [www.fa.ml.com/DPRJ.Group](https://urldefense.proofpoint.com/v2/url?u=http-3A__www.fa.ml.com_DPRJ.Group&d=DwMCAg&c=2jpuOek3j4P5cpE4ozX__g&r=9zzDs1XzlNLoeb9f-wvDNQa2SxiR3oP8cyEI2LqayAI&m=0aJ36vEtSwOVOCc9Rc4C81WwT0AUqIi-d2WYdrpafXk&s=NQkpyH1Zek4Y9bCMubedQUSP0wwao4yqZhluFXIfQjw&e=)   
 <http://fa.ml.com/LSPTeam>

***3. Contact your*** ***Brokerage Firm/Agent***  
 Provide them with the following:

* Merrill Lynch DTC #: 8862
* ***Account title & number:*** Tucson Rotary Managed General Fund, Account #XXX-XX-049
* ***Further credit to:***
  + - * + Community Charities (Acct # XXX-XX-046)
        + Hispanic Scholarship (Acct # XXX-XX-047)
        + Scholarship Fund (Acct# XXX-XX-048)
        + Community Charities Permanent Endowment Fund (Acct # XXX-XX-065)
        + Scholarship Permanent Endowment Fund (Acct # TBD)
        + International Projects Permanent Endowment Fund (Acct# TBD)
* **Please note:** They may have a form to be completed and signed by you, the donor.

*Disclaimer: The instruction provided in this material is for general information only and is not intended to provide advice or specific recommendations for any individual. To determine what may be appropriate for you, consult your financial advisor and/or qualified tax advisor.*