



Gifts via Stock and Wire: Transfer Instructions

For all stock gifts and wire transfers, please use the attached Ronald McDonald House Transfer Instruction Letter. **In order to properly acknowledge your gift and ensure the correct donor is credited for the gift, please notify us of the transfer.** Please state the purpose of your gift and an address to send a gift acknowledgement.

The value of your stock gift is determined by taking the mean of the high and the low value of the security on the day that it is credited to the Ronald McDonald House account or the day that the certificate is in the custody of the House with a gift letter and an executed stock power. If mailed through the U.S. Postal Service, the gift value is established on the date of the postmark. The House's Federal Tax ID Number is 94-2538615.

Attached is a letter you may use to send directly to your broker or bank trust officer with your gifting instructions. If you wish to gift a stock certificate rather than have your bank or broker deliver the stock electronically, please have the certificate registered in the name of "Charles Schwab & Co., Inc. as custodian, fbo Ronald McDonald House at Stanford", as specified on the attached form. ***Please send or fax a copy of your transfer authorization to the House at the address below so we may expect your gift.***

If the certificate is registered in your name, send it to the House ***unsigned***, along with a letter confirming the gift to the House. You will want to include the specific purpose of the gift. Send a signed stock power in a separate envelope. Stock powers must be signed as the name(s) appear on the stock certificates.

Delivering or Mailing Certificates

Finance Director
Ronald McDonald House at Stanford
520 Sand Hill Road
Palo Alto, CA 94304
650.470.6009
650.470.6018 (fax)
cynthia@ronaldhouse.net

Asset Manager Contact

Priya Patel
Wetherby Asset Management
417 Montgomery Street, Third Floor
San Francisco, CA 94104
415.399.9159
415.399.9330 (fax)
priya@wetherby.com



RONALD McDONALD HOUSE
AT STANFORD

Ronald McDonald House Transfer Instruction Letter

**** NOTE: In order to properly acknowledge your gift and ensure the correct donor is credited, please notify us of the transfer. ****

To: _____ (Broker or Bank Name & Contact)

From: _____ (Donor Name & Address)

Date: _____ (Current Date)

Re: Account No. _____

Please accept this memo as your authorization to make a gift to **Ronald McDonald House at Stanford (Tax ID # 94-2538615)** from my referenced account as soon as possible or on _____ (specify date). The specific purpose of my gift is _____. If you need to contact me or have questions regarding these instructions, my number is _____. Please deliver (check applicable boxes):

_____ shares/units of _____ (specify stock or bond)

Cash in the amount of \$_____

Include my name in the transaction description on the delivery specified above. Following are the delivery instructions:

Electronic Delivery

Wire Transfer Instructions

All deliveries must include client name and Schwab account number.
Wire to: Citibank NA, 111 Wall Street, New York, NY 10043.
ABA# 021000089
FBO: Charles Schwab & Co., Inc.
A/C #: 40553953
For the Account of Schwab A/C # 3842-4248
F/F/C Client Name: Ronald McDonald House at Stanford Gift Account

DTC Eligible

Ronald McDonald House at
Stanford Gift Account #
3842-4248
Delivery to DTC Clearing
0164, Code 40

Physical Delivery

Please issue a physical certificate for the gift specified above registered as follows: **Charles Schwab & Co., Inc. as custodian, fbo Ronald McDonald House at Stanford.** Send the certificate to: Charles Schwab & Co., Inc., Attn: Transfer of Accounts, PO Box 52013, Phoenix, AZ 85072. **Include a copy of this memo with the stock certificate.**

Mutual Fund Units

Please gift _____ units of _____ (mutual fund name).
For re-registration instructions, contact Priya Patel at 415.399.9159.

Donor Signature(s)

Date