Making a Gift of Stock to Strathmore

Thank you for your interest in making a gift of stock to Strathmore. To execute your transfer, please follow the instructions below.

**Step One:**
Please instruct your broker to transfer your stock contribution to Strathmore Hall Foundation’s account. Your broker will need the following information regarding Strathmore’s brokerage:

The J. K. Meek Group at Graystone Consulting  
**DTC #** 0015  
**Account** #633-901335  
**Federal Tax Identification Number** 52-1233092  
**Reference/Memo (this is critical information to include)** This is a gift donation made by ____________ (donor’s name) and donated to Strathmore Hall Foundation, Inc.

Stock certificates can be mailed to:  
The J. K. Meek Group at Graystone Consulting  
650 South Exeter Street, Suite 1100  
Baltimore, MD 21202

**Contact:** Sumaiya Andaleeb  
Sumaiya.Andaleeb@msgraystone.com — 410.736.5416

**Alternate contact:** Lemuel Bourne  
Lemuel.Bourne@morganstanley.com — 410.736.5369

**Step Two:**
For us to identify your generous gift and issue a tax receipt, please be sure to inform us of your contribution. Privacy laws discourage brokerage firms from releasing the names of clients, making it a challenge on our end to acknowledge gifts.

Please mail or email a copy of your written instructions authorizing your broker to transfer your donation to Strathmore, including your intentions regarding the purpose of your contribution, to:

Erin Phillips, Strathmore  
5301 Tuckerman Lane, N. Bethesda, MD 20852 — ephillips@strathmore.org

**Tax Considerations**
The gift value of the securities is the average between the high and low prices, multiplied by the number of shares transferred, on the date one of the following occurs:

1. The securities are placed in an account in the name of Strathmore Hall Foundation;
2. The securities and stock powers are hand delivered or mailed (date of postmark) to Strathmore Hall Foundation.

For questions, please contact Erin Phillips, Director of Donor Engagement, at 301-581-5160 or ephillips@strathmore.org.

_Last Updated: November 2019_