



How to Make a Gift of Stock, Bonds or Appreciated Mutual Fund Shares

*Thank you for your interest in making a gift to Inglis.
The following information can serve as a reference to both you and your stock broker.*

- Notify your broker of your wish to donate stock, bonds or appreciated mutual fund shares to Inglis—indicating the name of stock/fund and number of shares. Also, let your broker know the name of the Development Office contact at Inglis:

Jessica Scipione, Director of Individual Giving
(267) 635-2541
jessica.scipione@inglis.org

Once you have notified your broker of your intentions, Inglis is happy to work directly with your broker to facilitate the gift, if you prefer. Simply provide the broker's name and phone number, and Inglis will forward along instructions.

- When you have made your gift, please notify the Inglis Development Office by phone, mail or email, making note of the transfer date and the value on that day. Please note that we may not receive timely notification of your donation, so your direct notification is very much appreciated.
- We prefer not to open new brokerage accounts to facilitate this type of gift. If your broker cannot sell the stock, bonds or appreciated mutual fund shares in its street name without opening an account for Inglis, we will ask your broker to process your gift in one of two ways:

1) Contact Muriel Siebert & Company, Inc. (DTC # 0226), to arrange an electronic transfer of the stock to the Inglis account (#TSP067717)

Before wiring the transaction, your broker should contact Gus Langford at Muriel Siebert & Company, Inc. (1-800-545-7773, ext. 3823) to **a)** notify him on what stock is coming and from where, **b)** to provide a DTC #, and **c)** to instruct Select Investing to credit the stock to the Inglis Account #TSP067717.

OR

2) The stock certificates can be transferred to “Inglis Foundation” or “Inglis House” and delivered to the Development Office at the address indicated below. **YEAR-END TRANSFER**
NOTE: Your gift is not complete until the certificates are in our possession.

Thank you for your support!

Inglis
Attn: Development Office
2600 Belmont Avenue
Philadelphia, PA 19131

Phone: (267) 635-2541 Email: jessica.scipione@inglis.org
Inglis Foundation Federal Tax ID# 23-232-6553
Inglis House Federal Tax ID# 23-135-2284