



Inspiring Tomorrows™

## ***Gifts of Security Transfer Instructions***

Thank you for your interest in supporting **Junior Achievement of the Eastern Shore** in the form of a Security Transfer. Please note that you must initiate all security donations with your broker and please consult your broker to ensure that the stock is eligible for electronic delivery over the Deposit Trust Company (DTC) system (this is the fastest, most secure, and cost-effective method of donating securities).

Acknowledgment will be made in compliance with IRS regulation. Please consult with your tax advisory before making a charitable donation to any charity.

Please complete (or request that your broker complete on your behalf) the information below to ensure that your gift is processed accurately. Once you've made a transfer, please contact Jayme Hayes by phone at 410-742-8112 or by email at [Jayme.Hayes@ja.org](mailto:Jayme.Hayes@ja.org) to inform **Junior Achievement of the Eastern Shore** of the proposed donation and to ensure that you receive a prompt receipt of your gift for your tax records.

### **Donor and Securities Information:**

_____	_____	_____	____/____/____
Name & Type of securities	Security symbol	Number of shares	Transfer date
_____	_____		
Donor name (Individual, Corporation, Foundation)	Broker name		
_____	_____		
Donor Address	Broker Company / City / State		
_____	_____		
Donor City / State / Zip	Broker telephone number		
_____			
Donor Phone and email address (to be used only if a question arises in the donation process)			



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**Specific processing procedures:**

Receiving firm name and address:  
Wye Trust, a division of Shore United Bank N.A.  
Attention: Talli Oxnam  
16 North Washington Street Easton MD 21601  
(410) 763-8543 [Talli.Oxnam@wyetrust.com](mailto:Talli.Oxnam@wyetrust.com)



**DEPOSITORY TRUST COMPANY (DTC) for DTC Eligible securities**

Agent Bank Name:	The Northern Trust Company
Agent Bank Participant Number:	2669
Agent Bank Number:	20290
Institutional Number at DTC:	26725
Our Custodian Account Number:	17-34721
Our Account Name at Northern:	First State Trust Company
	FBO: Wye Trust
	<b>FFC: JA of the Eastern Shore</b>

**Donor signature:**

All account owners must sign this request (e.g., an individual account would require one signature; a Joint Tenants in Common account would require two signatures).

The donor imposes no restrictions on Junior Achievement of the Eastern Shore's use of such gifted funds and acknowledges that Junior Achievement of the Eastern Shore provided no goods or services in return for the donation.

**Junior Achievement of the Eastern Shore Fed ID: 52-1461040.**

\_\_\_\_\_  
Donor signature

\_\_\_/\_\_\_/\_\_\_  
Date signed

\_\_\_\_\_  
Donor signature

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Date signed