

Any donor. Any gift. Any charity.

---

## Gift of stocks

Giving stock you have held more than one year is a tax-efficient way to make a charitable gift. You receive an income tax deduction for the fair market value of your stock on the date of your gift and avoid all capital gains taxes that would have been due if you sold the stock first.

We typically hold assets contributed to the Foundation until we discuss the investment policy with the financial advisor for the account. Standard practice for gifts of securities is to transfer funds directly into the RCF-owned investment account associated with the donor advised fund (DAF). Please speak with a member of the RCF team at 866-803-0389 before making gifts of stock via the instructions below

There are two main ways to make a stock gift to Renaissance Charitable Foundation Inc.: by electronic transfer or by mailing your certificates. Electronic transfer works much faster.

### ► Electronic transfer

1. Provide written instructions for your broker to make a transfer to Renaissance Charitable Foundation Inc. specifying the name of the stock and the number of shares you are giving. If you instruct your broker verbally, we strongly recommend you follow up in writing.
2. Your broker will need the following routing information to transfer stock into the Renaissance Charitable Foundation's account:  
**DTC #0352**  
**For Chase Investment Services Corp. for further transfer to the account of Renaissance Charitable Foundation Inc. Account 739-43197**  
**Tax ID#35-2129262**
3. Please instruct your broker to include your name and contact information with the transfer. Also, please tell us about your gift by faxing a letter to 877-736-4620 so that you get a prompt receipt of your gift for your tax records.

### ► By mail

1. DO NOT sign the back of your certificate(s). Doing so will delay the date of your gift until the certificates are transferred into our name on the company's records.
2. Sign Section 4 of one blank Stock Power form for each certificate. Call us at 866-803-0389 to request a copy of this form, which must be Signature Guaranteed. The name in Sections 1 and 4 of this form must precisely match the name on the certificate.

3. Sign Section 3 of one blank Stock Waiver form for each certificate. Call us at 866-803-0389 to request a copy of this form, which must be Notarized. The name in Sections 2 and 3 of this form must precisely match the name on the certificate.
4. Send the certificates in one mailing and in a separate mailing, send the completed Stock Power and Stock Waiver forms to:

**Renaissance Charitable Foundation Inc.**  
**8910 Purdue Rd, Suite 555**  
**Indianapolis, IN 46268**

*Please do NOT make the gift anonymously*

### ► Stock valuation

1. The date of your gift is the date on which you give up control. In most cases, this is the date you transfer the shares electronically into Renaissance Charitable Foundation's account or the postmark date on which you mail your certificates, stock powers, stock waivers, and/or Letters of Authorization to Renaissance Charitable Foundation. In some cases, the date of gift is delayed until the company's transfer agent changes their official records to reflect ownership of the shares by Renaissance Charitable Foundation.
2. In most cases, the tax-deductible value of your gift is the average of the highest and lowest trading prices on the date of your gift multiplied by the number of shares given.

For further information, please contact Renaissance Charitable Foundation at 866-803-0389 or visit our website at [rcgf.org](http://rcgf.org). Log in to view your DAF account at [RCF.DonorFirstX.com](http://RCF.DonorFirstX.com)

# Stock/Bond Power

# Chase Investment Services Corp.

Member FINRA and SIPC

Page 1 of 1

Mail ORIGINAL, completed form (along with certificates) to:

J.P. MORGAN CLEARING CORP.,

Attn: JPMCC Cashier's Dept.,

4 Chase Metrotech Center, Mail Code NY1-C060

Brooklyn, NY 11245-0001

Account Number

739-43197

Rep Code

Use this form to transfer ownership of a stock/bond certificate currently held with CISC if this form is completed, it is not necessary to endorse the back of the stock/bond certificates(s).

## 1 Transferor Information - Name on Registered Certificate

Transferor (Current Owner) Name

## 2 Recipient Information - Name on Brokerage Account

Are Transferor registration and Recipient registration the same? (Select one)  Yes  No (If no, refer to important information comment below)

**IMPORTANT INFORMATION, PLEASE READ:** A Stock Waiver is required if the Transferor Information and Recipient Information do not match. Additional documentation may also be required depending on the registration to verify the authorized signatory(ies) (e.g., a registration in the name of a Corporation requires a Corporate Resolution).

Recipient (New Owner) Name

RENAISSANCE CHARITABLE FOUNDATION INC.

## 3 Stock/Bond Certificate Information

### If STOCK, complete this section

Number of Shares Class of Stock (e.g. Common, etc.) Full Name of Stock Certificate Number(s)

   

### If BONDS, complete this section

Number of Bonds (face amount) Full Name of Bond Principal Dollar Amount CUSIP Number(s)

   

## 4 Transferor Signature(s)

FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign, and transfer to the recipient indicated above. The above-referenced stock/bond stands in the name of the undersigned on the books of said Company. The undersigned does(do) hereby irrevocably constitute and appoint J.P. Morgan Clearing Corp. attorney to transfer said stock or bond(s), as the case may be, on the books of said Company with full power of substitution in the premises.

Transferor (Current Owner) Signature

X

Date (mm/dd/yyyy)

/ /

Transferor (Current Owner) Signature

X

Date (mm/dd/yyyy)

/ /

### IMPORTANT, PLEASE READ CAREFULLY

The signatures on this assignment must (1) correspond with the name (s) as written upon the face of the certificate, in every particular without alteration or enlargement, or any change whatever; (2) if signed in representation of Stockholder/Bondholder, indicate the capacity of the signer in the space provided below (e.g., Executor, Administrator, etc.); (3) be guaranteed by a financial institution who is a member of an approved Medallion Guarantee program.

If applicable, indicate capacity of signer above (e.g., Executor, Administrator, etc.)

Signature/Medallion Guarantee

**Signature Verification - To be completed by investment representative only if Medallion Stamp is not applied.**

### Investment Representative Signature for client verification

#### How was authentication performed?

Driver's License  Investment Account Application

Other (please specify)

Representative must sign indicating that signature verification has been performed for all signatures on this form.

Investment Representative Signature

X

Date (mm/dd/yyyy)

Investment Representative Name (Please Print)

Investment Representative Telephone Number

# Stock Waiver

# Chase Investment Services Corp.

Page 1 of 1

Member FINRA and SIPC

Mail ORIGINAL, completed form (along with certificates) to:  
J.P. MORGAN CLEARING CORP.,  
Attn: JPMCC Cashier's Dept.,  
4 Chase Metrotech Center, Mail Code NY1-C060  
Brooklyn, NY 11245-0001

Account Number

739-43197

Rep Code

Use this form to assign a stock certificate to a third party.

## 1 Account Holder (Recipient) Information

Account Holder Name

RENAISSANCE CHARITABLE FOUNDATION INC.

## 2 Donor Information

Certificate Registration - exactly as it appears on the certificate (e.g., John Public)

Donor Social Security or Tax ID Number

Certificate Description (e.g. IBM)

Total Share Amount (e.g. 200)

## 3 Donor Signature(s)

I/We, whose signature(s) appear below, deliver herewith to Chase Investment Services Corp. (CISC) the above-named Certificate duly endorsed on the back or on a signed Stock Power, and authorize CISC to place the securities evidenced by the Certificate in the brokerage account listed above. CISC may henceforth, for all purposes whatsoever, treat the Recipient as the absolute owner of said securities and of all proceeds resulting there from. I/We intend this to be a full release of all claims of ownership I/we might have to the securities, in favor of the Recipient. CISC shall not be responsible to me/us in any way for the profits, proceeds or use thereof and I/we agree to indemnify CISC and hold CISC harmless from any loss and/or liability in connection therewith.

Donor Signature

X

Date (mm/dd/yyyy)

/ /

Donor Signature

X

Date (mm/dd/yyyy)

/ /

## 4 Notary Signature and Seal

Notary Public Signature

X

Date Sworn/Affirmed (mm/dd/yyyy)

/ /

Official Capacity of Official Administering Oath

X

Date Commission Expires (mm/dd/yyyy)

/ /

AFFIX NOTARY SEAL