

# Making Gifts of Stock

## TO THE OHIO HISTORY CONNECTION FOUNDATION

Thank you for your interest in making a gift of stocks to The Ohio History Connection Foundation. We can accept both publicly traded securities and closely held securities.

**TO MAKE A GIFT OF STOCK, IT IS NECESSARY TO NOTIFY BOTH YOUR BROKER AND THE OHIO HISTORY CONNECTION OF YOUR INTENTION.**

### 1 NOTIFICATION TO YOUR BROKER

When making a gift of stock, you will need to provide your broker with a "letter of instruction" authorizing the transfer of stocks and including the information provided below.

<b>BROKERAGE FIRM</b>	<b>Fidelity Investments</b>
<b>CONTACT</b>	<b>Samantha Karoly – 216.621.1090 ext. 257</b>
<b>DTC NUMBER</b>	<b>0226</b>
<b>OHIO HISTORICAL SOCIETY FOUNDATION - ACCOUNT NUMBER</b>	<b>637025230</b>

With the above information, your broker can arrange an electronic transfer. *Note: You could lose your capital gains tax benefit if your brokerage company sends a check to you. Please have them send the stock transfer instructions directly to the brokerage contact shown above.*

### 2 NOTIFICATION TO THE OHIO HISTORY CONNECTION

You or the transferring broker must provide the following information to the Ohio History Connection's Development Office to ensure that you receive the appropriate acknowledgment for your tax filings and recognition for your generosity.

- Your name and complete mailing address
- The company name and number of shares of securities being transferred
- Date of the transfer
- The designation, if any, of your gift to a specific project or program

Please send this information to the attention of Ann Ruege,  
Ohio History Connection, 800 E. 17th Ave., Columbus, OH 43211 or [aruege@ohiohistory.org](mailto:aruege@ohiohistory.org).

**THANK YOU FOR  
YOUR GENEROUS  
SUPPORT OF  
OHIO HISTORY!**

### CONTACT US

If you have any questions or would like to discuss ways to designate your gift, please contact:  
Ann Ruege – Chief Development Officer | 614.297.2342 | [aruege@ohiohistory.org](mailto:aruege@ohiohistory.org)

