

Donation Instructions

The following transfers are covered by these instructions:

- DTC or Electronic Transfer of Stock
- Transfer of Mutual Fund(s)

DTC OR ELECTRONIC TRANSFER INSTRUCTIONS

DTC or Electronic transfer is the fastest and most secure method for donating securities.

It is a two-step process:

- 1- Please notify **Linda Ashcraft Hudak** at LASHCRAFT-HUDAK@GEORGE MARK.ORG with your intention to donate securities prior to initiating the transfer of securities to **George Mark Children's Fund**.
- 2- Our account is held at First Republic Securities Company LLC (FRSC). Prior notification is critical to identifying your gift of securities, as donor information does NOT transmit through the DTC system.
 - a. Broker Instructions to deliver securities to our brokerage account at FRSC:

Deliver To	First Republic Securities Company LLC
DTC	0443(Clearing through Pershing LLC)
Account Number	33L328052
Account Name	George Mark Childrens Fund
Reference	{Donor Name-Year } or {Anonymous }

Mutual Fund Instructions

Please contact Michael Walsh at First Republic Securities Company at Onlinebrokerage@firstrepublic.com

The following information is required:

Account Number	
Share Quantity	
Symbol	
Donor Name	{Donor Name-Year } or {Anonymous }
Financial Institution	

Your donation will NOT be complete until you notify George Mark Children's Fund of your intent to donate securities, and until shares are received in The George Mark Children's Fund First Republic Securities Company (FRSC) Brokerage account.