



**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 **Theresa Cruz and Shekinah Eliassen** at [Tcruz@georgemark.org](mailto:Tcruz@georgemark.org) and [Seliassen@georgemark.org](mailto:Seliassen@georgemark.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:

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

**Mutual Fund Instructions**

Please contact Michael Walsh at First Republic Securities Company at [Onlinebrokerage@firstrepublic.com](mailto:Onlinebrokerage@firstrepublic.com)

The following information is required:

<b>Account Number</b>	
<b>Share Quantity</b>	
<b>Symbol</b>	
<b>Donor Name</b>	{Donor Name-Year } or {Anonymous }
<b>Financial Institution</b>	

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.