

Make-A-Wish Foundation® of Philadelphia & Susquehanna Valley
One Valley Square
512 Township Line Road, Suite 133
Blue Bell, PA 19422
215-654-9355
215-654-9346
www.philadelphia.wish.org
(EIN) Tax Identification #22-2755963

INSTRUCTIONS FOR MAKING GIFTS OF STOCK

Certificates Held by Donor

If the certificates are held by a donor, he or she simply needs to put the unsigned certificates in an envelope directed to the attention of the Executive Director, the Make-A-Wish Foundation® of Philadelphia & Susquehanna Valley. In a separate envelope, also to the Executive Director's attention, put one signed stock power for each separate stock issue and a signed gift letter. The stock power(s) should have a signature guarantee (available at a local bank); also please only sign the stock powers, do not fill in the descriptive blanks. Mail both envelopes to the Make-A-Wish Foundation of Philadelphia & Susquehanna Valley at the address above. It is important to use two separate envelopes as the stock powers and certificates together are negotiable.

Stocks Can be Transferred via DTC

To transfer stock via DTC, please give the following information to your broker:

Make-A-Wish Foundation of Philadelphia & Susquehanna Valley Broker/Account Executive:
Stephen Frank
The Frank Financial Consulting
Two Tower Bridge
One Fayette Street, Suite 200
Conshohocken, PA 19428
610-832-7600

Account Name:

Make-A-Wish Foundation® of Philadelphia & Susquehanna Valley
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For More Information:

Please call, or have your broker call Stephen Frank at 610-832-7600 or our Executive Director, Dennis Heron at 215-654-9355 ext. 111 with any questions.