Gifts of Stocks That are Traded on a Stock Exchange

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.

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 JP Morgan Clearing 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 877-222-1829 so that you get a prompt receipt of your gift for your tax records.**

   Please do NOT make the gift anonymously.

**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. List only one company on each Stock Power and Stock Waiver form.

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 Road, Suite 555
   Indianapolis, IN 46268

**Stock Valuation**

1. The date of your gift is the date on which you give up control. In most cases, this is either the date the shares arrive 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 [www.RCGF.org](http://www.RCGF.org).
Stock/Bond Power

Mail ORIGINAL, completed form (along with certificates) to:
J.P. Morgan Securities LLC ("JPMS")
Attn: JPMS Physical Securities Processing Dept.
Mail Code NY1-C060, 3rd Floor East
4 Chase Metrotech Center
Brooklyn, NY 11245-0001

Use this form to transfer ownership of a stock/bond certificate; if this form is completed, it is not necessary to endorse the back of the stock/bond certificate(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 JPMS 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)

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)

Investment 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

INVESTMENT AND INSURANCE PRODUCTS ARE:

- NOT FDIC INSURED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY
- NOT A DEPOSIT OR OTHER OBLIGATION OF, OR GUARANTEED BY, JPMORGAN CHASE BANK, N.A. OR ANY OF ITS AFFILIATES
- SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED

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Stock Waiver
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Mail ORIGINAL, completed form (along with certificates) to:
J.P. Morgan Securities LLC ("JPMS")
Attn: JPMS Physical Securities Processing Dept.
Mail Code NY1-C060, 3rd Floor East
4 Chase Metrotech Center
Brooklyn, NY 11245-0001

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

1. **Account Holder (Recipient) Information**
   Account Holder Name - exactly as it appears on the account registration
   RENAISSANCE CHARITABLE FOUNDATION INC.

2. **Donor Information**
   Certificate Registration - exactly as it appears on the certificate (e.g., John Public)
   Donor Social Security (SSN) or Tax ID Number (TIN)
   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 JPMS the above-named Certificate duly endorsed on the back or on a signed Stock Power, and authorize JPMS to place the securities evidenced by the Certificate in the brokerage account listed above. JPMS may henceforth, for all purposes whatsoever, treat the Recipient as the absolute owner of said securities and of all proceeds resulting therefrom. 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. JPMS shall not be responsible to me/us in any way for the profits, proceeds or use thereof and I/we agree to indemnify JPMS and hold JPMS 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 - must be completed by a Notary Public**
   A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

   STATE OF  
   COUNTY OF  

   Subscribed, sworn to and acknowledged before me by  

   Name of Document Signer  

   this ______ day of _________, ________.  
   Month Year  

   X  
   Signature of Notary Public  
   My commission expires:  

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INVESTMENT AND INSURANCE PRODUCTS ARE:
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- NOT A DEPOSIT OR OTHER OBLIGATION OF, OR GUARANTEED BY, JPMORGAN CHASE BANK, N.A. OR ANY OF ITS AFFILIATES
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