

GIFTS OF SECURITIES

INSTRUCTIONS AND CONTACTS

The Development Office is pleased to help facilitate gifts of securities to Alteristic, Inc. These may include stock, bonds, or mutual funds (including disbursements from IRAs for individuals over 70 ½ years of age).

Broker-Assisted Electronic Transfers

The easiest, fastest, and safest way to gift appreciated securities held in “street name” for you by a broker or bank is by electronic transfer. This requires a letter from the donor(s) to the broker or bank that:

1. Identifies the shares (either a specific number or a target dollar total) to be transferred to “Alteristic, Inc.”
2. Explains how Alteristic should allocate the gift, i.e. general operations, scholarship support, research and development and whether the gift is restricted or unrestricted
3. Provides all information below on Alteristic’s brokerage account.

Sign the letter with your legal signature(s), and communicate your intention to Alteristic’s Development Office by emailing or mailing a copy of the letter to Craig Stapert. The individuals below can provide additional account information and assistance with your transaction.

Alteristic Contact

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Vice President, Operations and Strategic Partnerships
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Email: emmal@alteristic.org

Broker Contact

Mark Henderson
LPL Financial/Hamburg Financial Group
606-451-0393
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Strength of hope.
Power of action.