



Making a Gift of Stock/Securities

❑ **Electronic Transfer**

The most popular and efficient way to transfer securities to ideastream is by electronic transfer to the ideastream account at PNC. This is done through a free delivery, which means ideastream gets 100% of the value of the transfer.

Please notify your broker of your intent to make a gift of securities to ideastream. The broker will need the name of the stock, number of shares and the following information.

Bank:	PNC Bank
DTC Participation #:	2616
PNC Account Name:	IDEASTREAM GIFT ACCOUNT
PNC Account Number:	21-75-073-6911786
Contact Person:	Leah E. Fisher (216) 222-8220 Fax: (866) 301-8460 leah.e.fisher@pnc.com
ideastream Tax ID#:	34-1943865
Important information:	Advise your broker to include your name and address on the check stub so ideastream can properly acknowledge your gift.

❑ **Ideastream Contact Information**

Ella Fong	Telephone: (216) 916-6154
Director, Major Gifts	E-Mail: ella.fong@ideastream.org
ideastream	
Idea Center	
1375 Euclid Avenue	
Cleveland, OH 44115-1835	

❑ **Physical Certificates Delivered by Mail**

If your securities are not held at a broker, then you can either mail or hand deliver the certificates directly to ideastream.

If mailing, send your *unendorsed* certificate(s) and a cover letter (including your name, address, and purpose of the gift) in one envelope. In a second envelope, send a signed, *signature guaranteed*, stock power. We strongly recommend using registered mail to forward your certificates and stock power. A stock power form can be obtained at your local bank or by contacting ideastream.

Please do not mail endorsed certificates. Once the certificate is endorsed, it is legal tender and can be exchanged by anyone.

❑ **Physical Certificates Delivered In Person**

Certificates may be hand delivered to ideastream at Idea Center 1375 Euclid Avenue to the attention of Ella Fong weekdays between 9:00 AM – 5:00 PM. Upon arrival and in the presence of an authorized ideastream representative, you will be asked to sign the back of the certificate or sign a Stock/Bond Power.

❑ **Tax Advice**

Donors of securities are encouraged to consult their tax and/or financial advisors prior to making any stock gift.