



Susan L. Curtis Foundation

How to Gift Appreciated Stock

- 1. STEP ONE:** Please notify Alan Cartwright, Executive Director, of your intended stock gift by calling 207-774-1552.
- 2. STEP TWO:** Prior to actual transfer, please call (or have your broker call) Marc N. Colamaria (800-356-1781 x103) at F.L. Putnam Investment Management Company with:
 - a) your name;
 - b) broker's name, firm, and direct phone number;
 - c) name of securities;
 - d) approximate number of shares;
 - e) approximate value of securities;
 - f) expected date of transfer; and
 - g) intended purpose of the gift (e.g. general purposes, endowment, etc.)

Please instruct your broker to include your name when transferring the securities. Each year we receive stock gifts that don't carry the donor's name. The "blind" stock thus sits unclaimed and delays your acknowledgement.

- 3. STEP THREE:** Please have your broker transfer the appreciated securities to the Susan L. Curtis Foundation Account as follows:

BROKER DELIVERY INSTRUCTIONS:

Custodian: Charles Schwab

Deliver to: DTC# 0164

Account # 4463-5652

Donor Name: Your Name/Client Name

For the Account of: Susan L. Curtis Foundation

We will send an acknowledgment letter within one week of the receipt of stock. For tax purposes, your gift will be valued at the average of the high and low prices on the date

Susan L. Curtis Foundation assumes ownership of the stock.

Questions? Please call Marc N. Colamaria with F.L. Putnam Investment Management at 800-356-1781 x103

Thank you!