



## Stock donations

Thank you for your interest in donating stock to the National Inventors Hall of Fame. The tax planning benefits of donating appreciated shares of stock include deducting the amount of the charitable donation *and* avoiding the unrealized gains on the appreciated shares. Prior to donation, please seek advice from a qualified tax professional on how this may affect your tax situation.

### Following are a few simple steps to complete your donation:

1. Contact your financial institution, let them know you would like to gift stock, and ask for the appropriate form to fill out in order to do this.
2. You will likely need to have the following information handy to provide to your firm:
  - Your account number
  - The quantity of shares you would like to gift
  - The description of the shares (i.e., Google stock)
  - CUSIP/Symbol number of the stock (you can access this from your account statement, or <http://finance.yahoo.com>)
3. You will need to provide your firm the following information about us, as well:
  - Register in the name of: National Inventors Hall of Fame, Inc.
  - Address: 3701 Highland Park NW, North Canton, OH 44720
  - Account Number: 5CV265780
  - Taxpayer ID: 34-1580038
  - DTC Number: 0443
  - Contact person: Rhonda Campbell, CFO
4. Please complete the attached form in conjunction with your financial institution's paperwork and mail it to:

National Inventors Hall of Fame, Inc.  
Development Department  
3701 Highland Park NW  
North Canton, OH 44720

If you need additional information about us to provide to your financial institution, please contact the National Inventors Hall of Fame's Financial Advisor: SS&G Wealth Management – Marc Servodio at 330-598-2208. If you need assistance filling out the gifting documentation or have other questions on how to gift, please contact your financial institution.

Thank you!

Hannah Paulin  
Chief Strategic Officer  
330-849-6874  
[hpaulin@invent.org](mailto:hpaulin@invent.org)

I authorize Pershing LLC to act on my behalf and to accept this letter of authorization to transfer the below assets:

**Donor Information**

Registration: \_\_\_\_\_

Registration Type: \_\_\_\_\_

Account Number: \_\_\_\_\_

Broker/Dealer: \_\_\_\_\_

Security Name and Symbol: \_\_\_\_\_

Quantity: \_\_\_\_\_

Security Name and Symbol: \_\_\_\_\_

Quantity: \_\_\_\_\_

Security Name and Symbol: \_\_\_\_\_

Quantity: \_\_\_\_\_

Security Name and Symbol: \_\_\_\_\_

**Receiving Information**

National Inventors Hall of Fame, Inc.  
5CV265780  
DTC Number: 0443  
Rhonda Campbell, CFO

\_\_\_\_\_  
Signature of Donor (*\*Signature Guaranteed*)                      Date

\_\_\_\_\_  
Rhonda Campbell, CFO (Signature Guaranteed)                      Date

\*Please note: This form must be Signature Guaranteed, a form of authentication issued by a bank, credit union, or other financial institution that verifies the legitimacy of a signature. Prior to signing, please take this form to your bank or financial institution to witness your signature. A notary public cannot provide a signature guarantee. We cannot accept a notarization instead of a signature guarantee.