

# THE SOCIETY *of the* CINCINNATI



---

## **SECURITIES and MONEY TRANSFER INSTRUCTIONS**

---

### **SECURITIES TRANSFER for DONATION CLEARING**

Please use this information to transfer DTC eligible securities (stocks, bonds, EFTs) electronically to our broker:

**Broker: Truist Bank**

303 Peachtree Street, N.E., 15th Floor – Suite 1520

Mail Code 803-05-15-10

Atlanta, Georgia 30308

Attn: Beverly Glenn (Gift Administrator) / Louise Gorman (Alternate)

(404) 404-724-3556 / (404) 724-3344 or [TruistBankGiftClearing@Truist.com](mailto:TruistBankGiftClearing@Truist.com)

DTC Participant #2039

FFC: Account name: The Society of the Cincinnati Unrestricted Fund #7023792

Attention Gift Clearing

**Please provide donor/client name**

Mutual Funds: Contact [TruistBankGiftClearing@Truist.com](mailto:TruistBankGiftClearing@Truist.com) for mutual fund delivery instructions.

**URGENT:** Please contact the Development Office in advance to disclose what securities are being transferred for which donor. You can reach **Andy Morse, Director of Development at the Society**, by either phone at (202) 329-1561 or by email at [amorse@societyofthecincinnati.org](mailto:amorse@societyofthecincinnati.org)

---

### **WIRE or ELECTRONIC FUNDS TRANSFER**

To wire money electronically to the Society's bank account, or for bank wire-related questions, please contact **Susan Benjamin, Director of Finance** at the Society at either (202) 785-1387 or by email at [sbenjamin@societyofthecincinnati.org](mailto:sbenjamin@societyofthecincinnati.org)

*The Society of the Cincinnati is an IRS 501(c)(3) not-for-profit organization, and all gifts are deductible for tax purposes to the extent allowed by law. (Federal Tax ID # 53-0205423)*