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## SECURITIES and MONEY TRANSFER INSTRUCTIONS

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### 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) 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.

**IMPORTANT:** Please contact the Development Office in advance to disclose what securities are being transferred for which donor. You can reach **Brigid Leavy, Director of Development** at the Society, either by phone at (202) 495-7101 or by email at [bleavy@societyofthecincinnati.org](mailto:bleavy@societyofthecincinnati.org).

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### WIRE or ELECTRONIC FUNDS TRANSFER

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