

SIGMA CHI FOUNDATION

GIFTS OF SECURITIES INSTRUCTIONS

(Updated: 07-17-17)

Many donors find gifts of appreciated securities to be a financially sound and convenient way to benefit Sigma Chi, and we have attempted to make the process easy for you. A gift of appreciated securities will have even more favorable tax consequences for you than selling the stock and making a cash donation to the Foundation.

TO CONTRIBUTE STOCK

- 1) Provide the memo on the following page to your delivering broker.
- 2) Have your broker fax or email the completed form to Mill Creek Capital Advisors, who processes stock gifts for the Sigma Chi Foundation.
- 3) You may also want your delivering broker to fax/mail the completed form to you for your records.

Once Mill Creek Capital Advisors receives the completed form, they will notify the Sigma Chi Foundation of the gift. They will also provide a letter to the Sigma Chi Foundation which will include:

- a) Your name and address for acknowledgement purposes,
- b) The value of the gift (the average of the stocks high and low price range on the date the gift is received), and
- c) Stated purpose of the gift, if restricted.

Within two-weeks of receiving your stock gift, the Sigma Chi Foundation will provide you an acknowledgement letter and gift receipt.

MUTUAL FUND SHARES

Please contact Pat Burke at Mill Creek Capital Advisors at 610-941-7715 for transfer eligibility prior to submitting a mutual fund donation. You may also call Jaclyn Stumpo, Mill Creek Capital Advisors Client Services Associate, at 610.941.1369

STOCK CERTIFICATES

The most convenient and secure way to donate stock is to follow the steps listed above, and we recommend that you do so. However, if you should choose to send an actual stock certificate, please mail an UNSIGNED certificate along with a signed and dated Irrevocable Stock or Bond Power and the Stock Certificate Relinquishment Letter to the Sigma Chi Foundation. Note: Mill Creek Capital Advisors recommends that you **only sign and date** the Irrevocable Stock or Bond Power and the Stock Certificate Relinquishment Letter. They will complete the rest of the forms for you. It is strongly recommended that the stock certificate and the Stock or Bond Power be mailed separately. Mail the documents to:

Sigma Chi Foundation
Attn: Ashley Woods
1714 Hinman Avenue
Evanston, IL 60201

Upon receipt of the documents, the Foundation will then work with Mill Creek Capital Advisors to process the gift. Please be certain to include your contact information in case the Foundation needs more information.

The Sigma Chi Foundation is a 501 (c) (3) charitable foundation incorporated in Colorado and headquartered at 1714 Hinman Avenue, Evanston, IL 60201. The Federal tax I.D. # is 36-2208386. Your gift can be doubled or tripled if your, and/or your spouse's, employer has a **matching gift** program. Please visit your personnel or benefits office for forms and information.

If at anytime you have questions about the gifting process, please call Pat Burke, Mill Creek Capital Advisors, at 610-941-7715 or Walter Harris, Mill Creek Capital Advisors at 440-554-4495. You may also call Jaclyn Stumpo, Client Services Associate, at 610.941.1369

Thank you for your support of the Sigma Chi Foundation.

SIGMA CHI FOUNDATION



MEMO TO: Pat Burke
Mill Creek Capital Advisors, LLC
PHONE: 610-941-7715
FAX: 610-941-9792
EMAIL: pburke@millcreekcap.com

RE: **GIFT OF SECURITIES TO SIGMA CHI FOUNDATION**

THE FOLLOWING INDIVIDUAL(S) WILL BE MAKING A GIFT OF SECURITIES.

DONOR: NAME: _____
ADDRESS: _____

PHONE: _____

NAME OF SECURITY: _____

QUANTITY: _____ #OF SHARES

DELIVERING BROKER: _____

BROKER CONTACT:
NAME: _____
PHONE: _____

EITHER THE INDIVIDUAL NAMED ABOVE OR ASSISTANT WILL BE CONTACTING YOU TO COORDINATE THE TRANSFER OF THE SECURITIES.

BROKER DELIVERY INSTRUCTIONS:
(DTC eligible securities only, for all other types of securities contact Pat Burke or Walter Harris, Mill Creek Capital Advisors)

A/N: National Financial Services
DTC Participant #0226

ACCOUNT NUMBER: BPJ-003944
ACCOUNT NAME: Sigma Chi Foundation

PLEASE INDICATE BELOW IF THIS GIFT IS TO BENEFIT A SPECIFIC CHAPTER OR PROGRAM ACCOUNT. IN THE ABSENCE OF A STATED RESTRICTION OR AN EXISTING SIGMA CHI FOUNDATION PLEDGE, YOUR GIFT WILL BE CREDITED TO THE UNRESTRICTED ANNUAL FUND.
