



Thank you for your interest in donating a gift of stock or securities to Keiro! This form and following instructions are provided to help coordinate your stock transfer. Please forward this form to your broker to initiate the gift. Once the form is completed, please email or fax the form (or have your broker do so) to both Keiro and to Fund Evaluation Group (“FEG,” the receiving investment adviser).

**MEMO TO:** OCIO Client Service Team, Fund Evaluation Group | Keiro Services

**PHONE:** 513.977.4400 (FEG) | 213.873.5700 (Keiro)

**EMAIL:** OCIO@feg.com (FEG) | support@keiro.org (Keiro)

**FAX:** 513.806.2217 (FEG) | 213.873.5799 (Keiro)

**RE:** GIFTS OF SECURITIES

The following individual(s) will be making a gift of securities to: ***Keiro Services***

**Donor:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

**Name of Security:** \_\_\_\_\_

*\* Please contact FEG regarding any non-equity securities*

**Quantity:** \_\_\_\_\_ # of shares

**Delivering Broker:** \_\_\_\_\_

**Broker Contact:**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Either the individual named above or their broker 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 OCIO Client Service Team at FEG)

Charles Schwab & Co., Inc.

DTC# **0164**

Account Number: 4542-4188

Account Name: Keiro Services

Please note any restrictions on gifts: \_\_\_\_\_