



The following are instructions for making a transfer of marketable securities to The Miami Foundation. The marketable securities should be transferred electronically to the Foundation's account at JPMorgan Chase Bank, N.A. The transfer will be through DTC. The instructions are:

DTC Participant # 902 / JPMorgan Chase Bank, N.A.
FFC to Account Number: P72500 for Account Number W93289002
For Account of: THE MIAMI FOUNDATION INC – DCF
Attn: Client Service 800-634-3763

Please Note: All deliveries must include the Foundation's name and account number.

If the transfer involves mutual funds, a BIN # must be established. This should be coordinated closely with our team at JP Morgan and as much advance notice as possible should be given.

Prior to the electronic transfer, please complete the attached **Donor of Stock/Securities Form** and send a copy to:

Francisco Gozalo
Controller
The Miami Foundation
40 NW 3rd Street
Suite 305
Miami, FL 33128
O: 305.357.2080 | F: 305.371.5342
E: fgozalo@miamifoundation.org

Craig Williams
Vice President, Senior Client Service Associate
J.P. Morgan Private Bank
500 Stanton Christiana Road
Newark, DE 19713
O: (800) 634-3763 | F: (855) 538-5804
E: florida_service3@jpmorgan.com

We recommend that you please contact The Miami Foundation prior to effecting the electronic transfer as our transfer instructions are subject to change.



40 NW 3rd Street
 Suite 305
 Miami, FL 33128-1838
 305.371.2711

Donor of Stock/Securities Form

Francisco Gozalo
 Controller
 The Miami Foundation
 40 NW 3rd Street
 Suite 305
 Miami, FL 33128
 O: 305.357.2080 | F: 305.371.5342
 E: fgozalo@miamifoundation.org
 Dear Mr. Gozalo/ Mr. Williams:

Craig Williams
 Vice President, Senior Client Service Associate
 J.P. Morgan Private Bank
 500 Stanton Christiana Road
 Newark, DE 19713
 O: (800) 634-3763 | F: (855) 538-5804
 E: florida_service3@jpmorgan.com

The following shares of stock were donated to The Miami Foundation:

Stock Name	Ticker	# of Shares	Donation Date

I certify that prior to donation to The Miami Foundation, Inc. the stock shares listed above were property of:

Legal Name of Donor: _____

Donor's Signature: _____

Broker/Institution making delivery w/DTC#: _____

Charitable Fund to Receive Contribution: _____

