

Thank you for considering to make a gift of stocks, bonds or other appreciated securities. We recommend that you consult with your financial advisor or attorney before gifting stocks, bonds or other securities. Our investment managers are also available to consult with you at your request.

To make a gift of stock by electronic transfer, please contact your broker and provide the following transfer information to the JCPL Foundation's account at Fidelity. If needed, see sample "Stock Transfer Letter" below for you to use with your brokerage firm.

Fidelity Investments

DTC Clearing #0226

Acct #628-570716

P.O. Box 770002 Cincinnati, OH 45277-0074

JCPL Foundation's Federal Tax ID Number: 35-1462375

For questions, contact our investment advisor Evan Fruits, CFP® President of Koon Financial Planning & Consulting at 317-887-1714 or efruits@koonfinancial.com.

Please write or call the JCPL Foundation to notify us of your intent so that we are aware and can ensure that your gift is acknowledged. Thank you for considering a transfer of securities to our charitable organization!

Johnson County Public Library Foundation

49 E. Monroe Street

Franklin, IN 46131

Attn: Lisa Lintner, Library Director and JCPL Foundation Board Member

317-346-1501, lisa@jcplf.org

If you would like to initiate a gift from your IRA to the Library, please consult with your financial advisor and IRA provider for more information regarding requirements and transfer procedures and then notify the Library of your intent. Regarding IRA required distribution transfers, you may request the distribution check be made out to the Johnson County Public Library Foundation through your IRA provider (forms may need to be filed).

For questions or to learn more about any of these options, please contact your broker or Lisa Lintner at 317-346-1501, lisa@jcplf.org.

Gift of Marketable Securities to Johnson County Public Library Foundation, Inc.

STOCK TRANSFER LETTER

Donor Name(s)

Donor Address

Telephone Number

(Date)

(Name of Broker)

(Broker Address)

Re: Letter of instruction to transfer securities

Dear _____,

I wish to irrevocably transfer a charitable donation of _____ shares of _____ from my account number _____ to the brokerage account of the Johnson County Public Library Foundation, Inc., as follows:

Fidelity Investments

DTC Clearing #0226

Acct #628-570716

If there are any questions about the transfer of this stock, please call (***Donor Name and phone number***).

_____ (***Donor Signature***)

(Donor Name)

_____ (***Spouse Signature, if applicable***)

(Spouse Name)

cc: Johnson County Public Library Foundation

Attn: Lisa Lintner, Library Director

49 E. Monroe Street

Franklin, IN 46131

lisa@jcplf.org