



THE CLEVELAND MUSEUM OF NATURAL HISTORY

1 WADE OVAL DRIVE, UNIVERSITY CIRCLE, CLEVELAND, OHIO 44106
216.231.4600 | WWW.CMNH.ORG

HOW TO TRANSFER STOCK TO THE MUSEUM

Thank you for your interest in supporting the Museum by making a gift of stock. These simple guidelines will let us process your gift quickly and properly acknowledge it for income tax purposes.

STOCK TRANSFER INSTRUCTIONS – PLANNED GIFTS

If you want to transfer stock to fund a charitable gift annuity, charitable trust or other planned giving option, please contact Melissa Santee at (216) 231-4600 ext. 3430 or msantee@cmnh.org, for specific instructions.

STOCK TRANSFER INSTRUCTIONS – OTHER GIFTS

Please have your broker contact Jessica Webster at (216) 231-4600, ext. 3232 or jwebster@cmnh.org, with the following information:

- Name and address of donor
- Stock name
- Number of shares
- Date of stock transfer
- Designation for gift (unrestricted, or specific restricted fund)

We will tell your broker if the stock is to be sold. If it is, we will instruct your broker to sell the stock through the Museum's account and send a check for the net proceeds to:

Jessica Webster
The Cleveland Museum of Natural History
1 Wade Oval Drive
Cleveland, OH 44106-1767

If your brokerage does not have a Museum account, we will instruct your broker to transfer the stock to the Museum's account, as follows:

KeyBank
127 Public Square, Suite 1200
Cleveland, OH 44114-1306

DTC # 0443, Account No. RF4401251
ATTN: Kelly Metheny, (216) 689-7167

IMPORTANT NOTE

Your gift will be valued based on the mean market value of the stock on the transfer date of the gift.

ADDITIONAL INFO

CMNH Tax ID: 34-0714338

Thank you for supporting the Cleveland Museum of Natural History.