

Making a Gift of Securities to the Rowayton Library

Thank you for your interest in supporting the Rowayton Library.

When you make your gift of securities there are two principal steps that we ask you to take to ensure that the transfer of securities goes smoothly.

1. Instructions to your financial institution
2. Gift Notification Form to Rowayton Library

1. MAKING THE TRANSFER: INSTRUCTIONS TO YOUR FINANCIAL INSTITUTION

The easiest way to make a gift of securities is to arrange an electronic transfer of securities through a depository trust company (DTC).

Your brokerage or financial institution will be able to accommodate you and many institutions have a standard form that they require you to complete. They will need you to authorize the transfer. Please give your financial institution the following instructions:

Transfer the gifted securities to:

Vanguard Brokerage Service
Into Account #: **ALV 064997**
Name on Account: **Rowayton Library**
Tax ID: **06-0736950**
DTC# **0443**

Receiving agent is:
DTC / Brokerage
Vanguard Brokerage Service
455 Devon Park Drive
Wayne, PA 19087

Fax: (610) 669 5375

Please describe clearly the name and type of securities and the number you wish to transfer to the Rowayton Library. For example: "20 shares Intel common stock, approx. value of \$1,000" Or "\$10,000 from Fidelity mutual fund, account number 12345."

Notes on Timing: Please note, once your securities reach the Rowayton Library account, we will give our brokerage instructions to sell the securities. However, the end of the year (particularly December) is a busy time, and many institutions require that you initiate the transfer early in the month to ensure that it completes before the end of the month.

Form for Making a Gift of Securities to the Rowayton Library
Instructions and Notification (2 pages)

2. ENSURING YOUR GIFT IS PROPERLY RECOGNIZED BY ROWAYTON LIBRARY

When you make your gift of securities please complete and submit this form to:

Rowayton Library
Attn: Development Committee
33 Highland Avenue
Rowayton CT 06853

And/or copy by fax at the Library (203) 523-0438

The information provided should ensure that the securities transfer goes smoothly, and that the Rowayton Library credits your gift appropriately.

Personal Information

Email Address:

First Name:

Middle Initial:

Last Name:

Partner's First Name:

Partner's Middle Initial:

Partner's Last Name:

Address 1

Address 2

City

State

Postal Code

Country

Daytime Phone

Evening Phone

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The Asset

Please describe the assets you wish to transfer to the Rowayton Library. For example: "20 shares Intel common stock, approx. value of \$1,000" Or "\$10,000 from Vanguard mutual fund, account number 12345."

The Gift Purpose

This gift is given towards:

- Annual Fund Capital Campaign/Renovations Specific purpose

The Permission

Yes, the Rowayton Library has my/our permission to publish my/our name(s) in donor recognition lists. I/We would like my/our name(s) to appear (or our gift recognized) as follows

Please do not publish my/our names. I/We prefer to remain anonymous