



FRIENDS OF CASA OF FRANKLIN COUNTY, OHIO

<https://www.friendsofcasafranklincountyohio.com/>

How to Donate Appreciated Securities

Thank you for considering a gift of appreciated securities to Friends of CASA of Franklin County, Ohio. Please follow the steps below to ensure that your gift is properly transferred and credited in your name.

1. Advise your broker or bank holding your securities of your intent and identify which publicly-held securities you plan to donate. Your broker or bank will instruct you regarding written instructions or the necessary forms for your signature to authorize the transfer.
2. Provide the following information to your broker or bank:
 - Friends of CASA of Franklin County, Ohio
 - Schwab account # 8192-7646
 - DTC #: Clearing 0164, Code 40
 - Contact: Karen E. Kehres, Senior Investment Advisor/Director of Operations
Meyers Wealth Management
4100 Horizons Drive, Suite 101, Columbus, OH 43220
Ph: 614.442.6787 karen@meyerswealthmgmt.com
3. Instruct your broker or bank to include your name, the name(s) of the DTC eligible securities, and the number of shares when contacting Karen Kehres.
4. Advise Friends of CASA of Franklin County, Ohio of the pending transfer of securities via [email](mailto:karen@meyerswealthmgmt.com) or by phone to 614.401.0666
5. Please contact Karen Kehres if you are interested in transferring a stock certificate(s).

Note: do not mail endorsed or unendorsed stock certificates to either Friends of CASA or to Meyers Wealth Management.