



## PELTONIA

# INSTRUCTIONS: STOCK DONATIONS

Donors should consult a tax advisor about the deductibility of an appreciated stock gift.

---

### TO MAKE A STOCK DONATION:

- 01 → Contact your broker to set up the transfer of stock from your account to Pelotonia using the information below. Note: the transfer of stock will be made to The Ohio State University Foundation and will be routed to Pelotonia on your behalf.

The Ohio State University Foundation  
Morgan Stanley Smith Barney  
41 S. High Street, Suite 2700  
Columbus, OH 43215  
Attn: Elizabeth Pechiney  
614-229-4983  
Tax ID: 31-1145986

DTC: Morgan Stanley Smith Barney  
DTC #0015  
FBO: The Ohio State University Foundation  
Acct: 362-077946

- 02 → Complete the Charitable Gift Form on the following page in order to have your donation routed from The Ohio State University Foundation to Pelotonia. Once completed, email the form to [jgoldbach@pelotonia.org](mailto:jgoldbach@pelotonia.org).
- 03 → Be sure to have your broker let you know once the transfer is complete. You will receive an email confirmation from Pelotonia with the exact amount of your donation when the donation is received by Pelotonia and added to your Pelotonia profile. Be aware that the transfer and confirmation process could take up to 14 days.

---

### QUESTIONS:

If you have questions about your stock donation, please contact your personal broker or call Pelotonia at 614-221-6100 and select the option for Donation Questions.



**PELTONIA**

# CHARITABLE GIFT FORM: STOCK DONATIONS

\_\_\_\_\_  
Donor Name

\_\_\_\_\_  
Donor's Home Address

\_\_\_\_\_  
Email address

\_\_\_\_\_  
Daytime phone

\_\_\_\_\_  
Name and Participant Number for the Rider, Virtual Rider or Volunteer you are donating to

\_\_\_\_\_  
# of shares to donate & type of stock you are transferring (the value of your donation will be determined by the # of shares given multiplied by the average of the day's high/low stock price on the day the transaction is received by OSU)

\_\_\_\_\_  
Acquisition date of shares (if you don't indicate an acquisition date, your broker may default to transferring the oldest shares in your account)

I understand that I will receive a tax receipt from The Ohio State University Foundation for the average market value on the date of transfer to Ohio State's account, of these securities.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

---

Email the completed form to [jgoldbach@pelotonia.org](mailto:jgoldbach@pelotonia.org).