



Securities Gifting Made Easy

Here are the steps that you will need to follow in order to make a charitable securities contribution:

1. Notify Heritage Fund that you are gifting securities and include the following information:
 - Type of securities being gifted
 - Donor name and how you they would like to be recognized
 - How gift should be directed or used (i.e. what fund to deposit to, any special instructions etc.)
 - Send information to Kristin Munn via email at kmunn@heritagefundbc.org; or call 812-376-7772
2. Contact your account representative to transfer your gift electronically. Please provide your advisor with the following information:

Deliver to: DTC #0725

Raymond James & Associates

FAO: [HERITAGE FUND OF BARTHOLOMEW COUNTY, ACCOUNT #22778605](#)

Questions?

Contact Kristin Munn, Director of Development

kmunn@heritagefundbc.org

(812) 376-7772