



INSTRUCTIONS FOR GIVING STOCK AND MUTUAL FUNDS

Use the following Letter of Authorization (LOA) to contribute publicly traded securities such as stock and mutual funds and cash through your brokerage account. All contributions to the fund are irrevocable and are in most cases eligible for a tax deduction, however, individual circumstances vary. Please consult your tax advisor/financial advisor to determine much, if any, of your contribution is tax deductible.

The Letter of Authorization (LOA) on the following page is for your convenience. Please contact your financial institution to request their required procedures and forms and to provide them with the delivery instructions found below.

If we may serve you in any way, please contact us using one of the options provided at the bottom of this page.

STEP 1: INITIATE THE TRANSFER WITH YOUR BROKER

To transfer stocks or mutual funds that are being held electronically, please use the Letter of Authorization on the following page and instructions below. Include the giver's name on all deliveries.

Deliver All DTC Eligible Securities to DTC #0226

Honor Flight Columbus, Inc.

Federal Tax ID#: 26-4262700

Huntington Financial Advisors

Account: #OHE-675183

Note: Some financial institutions and mutual fund companies require the use of their own form or an additional letter of instruction. If your mutual funds are held at a brokerage firm other than the one listed, please check with your broker to see if the funds are transferable. If they are not transferable, please contact us.

STEP 2: NOTIFY HONOR FLIGHT COLUMBUS ABOUT YOUR TRANSFER

Please send Honor Flight Columbus a copy of your Letter of Authorization using one of these methods:

USPS MAIL:

Honor Flight Columbus
ATTN: Peter MacKenzie
PO Box 12036
Columbus, OH 43212-0036

COURIER (in person or UPS/FEDEX):

Honor Flight Columbus
ATTN: Peter MacKenzie
2233 N Bank Dr
Columbus, OH 43220-5422
Phone: 614-284-4987

EMAIL

info@honorflightcolumbus.org

FACSIMILE (FAX)

888-779-8806

Note: If we do not receive proper notification of a gift, it will be placed in a holding account until identified.

STEP 3: CONFIRM YOUR TRANSFER

Transfers of securities must be initiated by your financial advisor or broker. Please confirm with your broker or advisor that your gift has been transferred from your account to Honor Flight Columbus's account. Once received, it usually takes 3-5 business days for your transfer to be settled and posted to your fund's account.



LETTER OF AUTHORIZATION

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your organization. I understand that I must initiate this transfer with my broker. My intention is to gift these securities to **Honor Flight Columbus, Inc.**, a qualified exempt organization as described in Section 501(c)(3) of the Internal Revenue Code EIN: 26-4262700, in Columbus, Ohio. If you have any questions, or if there is a problem with this transfer, please contact me immediately at the phone number below. This gift is being contributed by:

Contributor Name(s)

Address Phone Number and Email Address

Name of Delivering Broker, Address, and Phone Number Anticipated Date of Transfer

My Account Number with your firm

Giving Designation/Purpose at Honor Flight Columbus:

General In **Memory / Honor** of (circle one) **Name** _____

Please deliver these shares to the following broker:

Via DTC #0226 to Honor Flight Columbus, Inc.'s Huntington Financial Advisors Account #OHE-675183

Please irrevocably transfer the following assets:

Cash Contribution: \$ _____

Stocks, mutual funds, or other publicly traded assets listed below:

Description of Assets/ Name of Security Symbol Exact Number of Shares Approximate \$ Value

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*Please initiate the transfer based on the number of shares and not the dollar value since security values may fluctuate.
Shares are to be transferred in-kind and are not to be liquidated.*

SIGNATURES

This is my written authorization to irrevocably transfer ownership of the assets specified in this form to Honor Flight Columbus, Inc., Columbus, Ohio. I understand that any contribution, once accepted by Honor Flight Columbus, Inc., represents an irrevocable contribution to Honor Flight Columbus and is not refundable to me for any reason.

Giver 1: Full Name (Please Print)

Giver 1: Signature

Giver 2: Full Name (Please Print)

Giver 2: Signature