



Dave Thomas  
Foundation  
for Adoption®

Forever Families for Children in Foster Care

## Gift of Stock Instructions

### STEP 1

Please contact Chip Spires, Chief Financial Officer, at [Chip.Spires@davethomasfoundation.org](mailto:Chip.Spires@davethomasfoundation.org) or 614.350.4736 for the Merrill Lynch brokerage account number.

### STEP 2

**Instruct your broker to make the transfer to:**

**Account name:** Dave Thomas Foundation for Adoption

**Account number:** 79E-\_\_\_\_\_

**DTC number:** 8862

### STEP 3

Ask your broker to notify the Foundation's Merrill Lynch contact when the transfer takes place.

**Cary Hanosek, CFP® CAP®**

The Simonton Walsh Hanosek Mangum Wealth Management Group

Vice President

Wealth Management Advisor

**Merrill Lynch**

8425 Pulsar Place, Suite 200

Columbus, OH 43240

**Email:** [cary\\_hanosek@ml.com](mailto:cary_hanosek@ml.com)

**Phone:** 614.880.4809

**Phone:** 877.296.3152

**Fax:** 614.441.4185

### STEP 4

Please contact Chip Spires, Chief Financial Officer, at [Chip.Spires@davethomasfoundation.org](mailto:Chip.Spires@davethomasfoundation.org) or 614.350.4736 to share the following information:

- Name of your broker's company
- Name of stock the Foundation's broker should expect
- Number of shares being transferred
- Approximate date of expected transfer
- Purpose of the gift (if applicable)