



## **Procedures for Transferring Publically Traded Securities to Miriam Foundation**

Listed securities or securities actively traded “over-the-counter” are acceptable as outright gifts and/or pledge payments. They are valued using the closing price per share on the date ownership is transferred to Miriam Foundation. In most cases, securities should be transferred electronically to Miriam Foundation.

To transfer securities, contact your broker and ask them to send to Miriam Foundation’s Stifel account, managed by David Weiss.

Transfer instructions for your broker are as follows:

Firm Name: Stifel  
Account Name: Miriam Foundation  
Account Number: XXXX-6579\*  
DTC Number: 793

\*Stifel will be able to process the transfer using the account number as listed above: XXXX-6579.

Our contact at Stifel is Jody Kelly.  
Her phone number is 314-726-8294 and her email is [kellyj@stifel.com](mailto:kellyj@stifel.com).

Once the transfer has been completed, please call the Miriam Foundation office or send us a letter informing us of the transfer and any specific instructions regarding the gift. This will allow us to acknowledge your gift in a timely fashion and direct the funds to the appropriate accounts.

Our federal tax identification number is 43-0667478. If you have questions on the transfer of stock, please contact Janine Lawler, Director of Development at (314) 962-6059 or [jlawler@miriamstl.org](mailto:jlawler@miriamstl.org).

**Thank you for your generous and thoughtful support of Miriam.**