



maryland
historical society

Instructions for Making Gifts of Stock

- ***Please advise the Maryland Historical Society of an intended stock gift prior to the transfer*** so that the development office is aware of the transaction, can expect its arrival and credit it to the appropriate donor. Please telephone Sean Valentine, (410) 685-3750 Ext. 319.
- Donors making stock gifts receive a tax-deductible contribution based on the mean value on the date of transfer to MdHS.
- Donors may make a gift of stock by advising their financial representative to contact either of the firms below with the instructions for the transfer. If additional assistance is needed or there are any special instructions, please contact Sean Valentine, (410) 685-3750 Ext. 319.

Brown Advisory

901 South Bond Street

Baltimore, MD 21202

Broker: Robert Lee Oster (410) 537-5513 Fax (410) 537-6513

Acct: 5690-0967

DTC: #0141

RBC Dain Rauscher

DTC# 0235

A/C# 309-75402

A/C Name – MD Historical Society Gifting Account

Please notify Bryon Epple at RBC (ph - 877-855-2220 or bryon.epple@rbcdain.com) prior to making the delivery.