



# Lutheran Homes Society

*Serving Christ through Community*

## GUIDELINES FOR CONTRIBUTING SECURITIES TO LHS FOUNDATION, TOLEDO, OHIO

The following guidelines have been prepared to assist you and your securities broker in completing securities transfers to LHS Foundation.

- *Please do not endorse* stock certificates.
- Complete the attached stock power form or one from any bank.
- Signature(s) placed on the stock power form (including initials) *must be identical to* the name(s) appearing on stock certificates.
- One stock power is adequate for any number of certificates from the same company if the owner's name is identical on all certificates. A separate stock power is necessary for each additional company.
- Mail the signed stock power in one envelope.
- Mail the unendorsed stock certificates in a separate envelope.
- The above documents do not need to be registered since neither document has any value without the other, but may be sent by certified mail to insure against loss.
- Please mail these documents to:

Rev. Donald E. Weiss  
Executive Director  
LHS Foundation  
2021 North McCord Road  
Toledo, Ohio 43615-0717

When the securities arrive, Rev. Weiss will see that your gift is acknowledged and deliver the securities to the Treasurer, who will confirm the amount, which is determined by averaging published trading information on the day the donor relinquished control of the stock, which will be the postmark date. The date on the stock power form will serve the same purpose if you deliver these documents personally.

Stock which is being held by the donor's broker or bank may be wire transferred to the LHS Foundation's broker, the Trust Company of Toledo via direct electronic transfer. *Please refer to the attached "Electronic Transfers of Shares of Publicly Traded Stock and Mutual Funds to LHS Foundation,"* and please send Rev. Weiss a copy of your instructions to your broker, so we can credit the transfer properly.

**If further consultation is desired before a transfer is made, please contact Rev. Weiss at 419-861-4973 or by e-mail at [DWeiss@LHSOH.org](mailto:DWeiss@LHSOH.org). Thank you for remembering Lutheran Homes Society.**

As followers of Christ, we are called to do what lies within our power to share burdens that weigh upon the young and the old and to alleviate sorrow and misery in His name.



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## LHS FOUNDATION

### IRREVOCABLE STOCK OR BOND POWER

**FOR VALUE RECEIVED**, the undersigned does (do) hereby sell, assign and transfer to

.....  
.....  
.....

.....shares of the .....  
stock of.....

represented by Certificate(s)No(s).....inclusive,  
standing in the name of the undersigned on the books of said Company.

.....Bonds of .....  
in the principal amount of \$.....No(s).....inclusive,  
standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint.....  
..... attorney to transfer the said stock or bond(s), as the case  
may be, on the books of said Company, with full power of substitution in the premises.

Dated .....

.....  
.....  
**(PERSON(S) EXECUTING THIS POWER SIGN(S) HERE)**

### INSTRUCTIONS

- The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) or bond(s) in every particular without alteration or enlargement or any change whatever.
- The only three sections of this power that you should complete are (1) appoint **LOCAL AND COMPANY (TRUST COMPANY OF TOLEDO, N.A.)** in the blank before the word attorney; (2) complete the dated blank with the current date; and (3) sign the power on the blank(s) at the bottom. If joint tenants, both must sign.
- If you have any questions, please contact Rev. Donald Weiss, Executive Director, at LHS Foundation, 419-861-4973 or DWeiss@LHSON.org.



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## ELECTRONIC TRANSFERS OF SHARES OF PUBLICLY TRADED STOCK AND MUTUAL FUNDS TO LHS FOUNDATION

Shares of publicly traded companies and mutual funds may be transferred electronically to LHS Foundation by using the LHS Foundation brokerage account: The Trust Company of Toledo, N.A.

**Remember to instruct your broker to contact Rev. Donald Weiss**, Executive Director of LHS Foundation, regarding the pending transfer, and to share with us your name, the number of shares, the name of the corporation or mutual fund, and the anticipated date of transfer so that LHS Foundation is aware of when to expect what from whom.

You will need to provide your broker with the brokerage DTC number, as well as LHS Foundation's account number.

At Northern Trust (The Trust Company of Toledo, N.A.), the DTC Number is 2669, the Reference Account Number is 17-95459, and the FBO should read: The Trust Company of Toledo, N.A., Agent of the LHS Foundation, Account Number is I5304500. Our contact person is Brian S. Epstein. The current address and telephone information are:

Mr. Brian S. Epstein  
Trust Executive  
The Trust Company of Toledo, N.A.  
6135 Trust Drive  
Holland, Ohio 43528

Phone: 419-865-8376  
Toll-Free: 1-800-453-0625  
FAX: 419-865-0915  
E-mail: [brian.epstein@the-trust-company.com](mailto:brian.epstein@the-trust-company.com).

Please contact Rev. Donald Weiss at LHS Foundation at 419-861-4973 or [DWeiss@LHSOH.org](mailto:DWeiss@LHSOH.org) should you or your broker have additional questions regarding electronic transfers of securities. And thanks for your gift!