



DONATE SECURITIES TO THE PORTAGE FOUNDATION

Federal Tax ID number: 34-1176817

138 E. Main Street, Suite 201C, Kent, OH 44240

You may donate securities directly to the Portage Foundation, including publicly traded stocks and bonds and nonpublic securities, which may provide important tax advantages. As the method of transferring securities depends on how they are held, please consult the Portage Foundation for additional guidelines.

For Gifts of Securities or Cash

To give securities or wire transfer funds held at a bank or brokerage firm, you will instruct your firm to transfer funds electronically to PNC Bank.

Notify the Portage Foundation of the forthcoming gift of securities or wire transfer funds by contacting Lindsey Loftus, Executive Director, and/or Cheyenne Goss, Foundation Specialist, at (330) 474-0480 or email at lloftus@portagefoundation.org or cgoss@portagefoundation.org to inform of the forthcoming gift to the Foundation.

The Portage Foundation will contact PNC Bank with notice of the gift to the Portage Foundation.

Provide your name, address, name of the security, number of shares to be donated, date of the transfer, purpose or designation of the gift, and the name and phone number of your bank or broker.

Instruct your bank or broker to do a Depository Eligible Securities (DTC) free delivery transfer to the Foundation's account at PNC Bank using the information below.

Depository Eligible Securities (DTC)

PNC DTC#: 2616

Reference: THE PORTAGE FDN – GRANTS [# Available Upon Request]

Attention: Ryan D. Smith

If you transfer stock through electronic transfer, the gift is effective on the date the shares are transferred to the Foundation's account.

For listed securities, the gift value is based on the mean of the market—the average of the high and low quotations—on the official gift date.

Instructions for Wiring Money

PNC ABA#: [Available Upon Request]

PNC Bank NA Charitable & Endowments #: [Available Upon Request]

Beneficiary Account Name: THE PORTAGE FDN – GRANTS [# Available Upon Request]

Attention: Ryan D. Smith

The Portage Foundation does not provide tax, legal or accounting advice. This material has been prepared for informational purposes only, and is not intended to provide, and should not be relied on for, tax, legal or accounting advice. You should consult your own tax, legal and accounting advisors before engaging in any transaction.