

INSTRUCTIONS FOR DONATING MARKETABLE SECURITIES

Making a gift of marketable securities may offer you several benefits:

- You can donate stocks, bonds, or mutual fund shares.
- The market value of the donated securities is tax-deductible as a charitable gift.
- If the value of the donated securities includes capital gains, neither the donor nor Canal Shores pays capital gains taxes on the appreciation.

For specific guidance, please consult your financial/tax advisor or the relevant IRS publication.

Transferring securities to Evanston Wilmette Golf Course Association (EWGCA) is a two-step process. If you have questions or need additional assistance with the transaction, please contact the Business Manager at info@canalshores.org or 847 475 9173.

STEP 1 – Arrange Transfer of Securities to EWGCA’s Brokerage Account

Your brokerage or financial institution may have a form for you to use. Instruct the institution holding your stocks or bonds to transfer them to the account of the EWGCA using the following information:

Account Name	Evanston Wilmette Golf Course Association
Account Number	6745-9975
Receiving Financial Institution	Romano Wealth Management 1560 Sherman Ave, Suite 1300 Evanston, IL 60201
DTC #	0141
Contact Person at Romano Wealth Management	Omar Haq, ohaq@romanowealth.com , 847-866-7700

If you wish to make a gift of mutual fund shares or if your stock is a physical (paper) certificate, different processing steps apply. For assistance, please contact Omar Haq at Romano Wealth Management.

STEP 2 – Notify EWGCA of the Transfer

Because stock and bond donations arrive in EWGCA’s account without accompanying donor information, please notify us of your donation by providing the following information so your gift can be identified, and a tax receipt be sent to you.

Your Name
Your Mailing Address
Name of Stock or Bond Transferred
of Shares Transferred
Date of Transfer
Financial Firm Making the Transfer
Any Additional Information (<i>e.g., in honor of, in memory of, for designation to a specific project at Canal Shores</i>)

You can submit this information by:

- Emailing the details to Business Manager at info@canalshores.org.
- Mailing the details to Business Manager, Canal Shores Golf Course, 1030 Central Street, Evanston, IL 60201.
- Phoning the Pro Shop at 847 475 9173.

Thank you for supporting EWGCA and Canal Shores.