



Gift of Securities

Thank you for your gift to the Orono Foundation for Education. The following is the process of gifting appreciated securities to our foundation:

Account: Orono Foundation for Education
Fidelity Account #: 658-055015
Fidelity DTC#s: 0226

Please provide this information to your financial institution to initiate the transfer. If you have questions or concerns, please contact our investment manager directly, Matt Arnold at Marks Group Wealth Management, 952.586.6117 or matt.arnold@marksgroup.com

-----Please email the information below to alert us of the transfer-----

Scan and/or Email to:
staff@oronofoundation.org
Orono Foundation for Education
(p) 952 545-6873

Donor Name: _____

_____ shares of _____

Transferring Brokerage Firm: _____ DTC# _____

Broker Name: _____ Telephone: _____

Gift should go toward: _____ Annual Fund _____ Endowment Fund

The Orono Foundation for Education has been organized and operated as tax-exempt under Section 501(c)(3) of the Internal Revenue Code. Tax Identification No. 41-1974305