

Giving a gift of securities

Donating gifts of securities to **Habitat for Humanity of the Mid-Willamette Valley** is an easy process and our staff will work with you to make it as simple as possible. To donate securities, follow these easy steps:

1. Contact your investment advisor who will have you sign a letter of direction outlining the shares that you wish to donate.
2. The transfer will be processed by your investment advisor.
3. The **Habitat for Humanity of the Mid-Willamette Valley** will send you a tax receipt to acknowledge your gift.

Before delivery, the donor should notify the **Habitat for Humanity of the Mid-Willamette Valley** and/or Pioneer Trust Bank, N.A. of the incoming security(ies) and quantity(ies). If sufficient information isn't provided, Pioneer Trust Bank may be required to return the shares.

Information to provide to your advisor:

Institution: Pioneer Trust Bank, N.A.

Account Name: Habitat for Humanity of the Mid-Willamette Valley

Delivery Instructions:

DTC Eligible Securities

DTC: 2669 – Northern Trust Company

Agent Bank ID #: 20290

Institutional ID #: 92964

For Further Credit: For Pioneer Trust Bank Acct# 17-25380 FBO **Habitat for Humanity of the Mid-Willamette Valley**

Fed Eligible Securities

ABA #: 123200059

Account: Trust 1050

For Further Credit: Pio Tr Bk Salem/Trust

Mutual Funds

Contact Pioneer Trust Bank for specific instructions

Street Name or Non-DTC Eligible Securities

Pitco, A Partnership

PO Box 2305

Salem, OR 97308

Pioneer Trust Bank Contact Information:

Pioneer Trust Bank, N.A.

Attn: Lisa Ratliff

109 Commercial St NE

Salem, OR 97306

503-363-3136

Fax: 503-364-4669

securities@pioneertrustbank.com