



People **Serving** People

Mutual Fund Donation Form—People Serving People

Instructions

Please provide the following information:

Name of Mutual Fund _____
CUSIP number/Ticker Symbol _____
Number of shares/Dollar amount _____
Income Distribution (Cash or Reinvest) _____
Are funds held by bank/broker/custodian _____
(If yes, provide name and contact) _____
Account number for bank/broker/custodian _____

Donor contact information _____

Please contact Northern Trust (NT) with the information above:

The Northern Trust Company
Foundation and Institutional Advisors
50 S. LaSalle Street
Chicago, IL 60603
312-444-5417 (p)
312-935-5592 (f)

Northern Trust will then notify the Mutual Fund team who will request a house account/bin number with the fund company. Northern Trust will then provide that information to the donor's custodian/broker/bank. (Please note, this process takes approximately 15 business days.)

Please contact People Serving People of the donation status via phone, fax, or email. Thank you in advance for your generosity and commitment to helping at-risk children and their families manage crisis situations and build a strong foundation for their long-term success.

Megan Kocer
Individual Giving Officer
612.274.7727
mkocer@peopleservingpeople.org

*People Serving People is a 501(c)(3) organization.
Your donation is tax deductible to the fullest extent allowed by law. Our tax ID number is 41-1965067.
Unless otherwise specified by donors, gifts are not restricted to a specific program.*