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.

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