

America's KESWICK Gift Acceptance Policy and Guidelines for Publicly Traded Securities

America's KESWICK has been blessed and appreciates donors who have used a variety of Charitable Giving methods over the years. Are you aware that a gift of appreciated stocks, bonds, mutual funds, or other securities given to America's KESWICK would greatly assist the ministry in a financial way? In addition to satisfying your desire for Charitable Giving, you could also benefit from a reduction in taxation. Please consult with your financial advisor for this possibility.

It is with gratitude that America's KESWICK accepts gifts of publicly traded securities such as stocks, bonds and mutual funds. These are the steps for completing securities gift transactions, with the most important step being your notification of America's KESWICK that you are making such a gift:

1. COMMUNICATE YOUR DESIRE TO DONATE AN ASSET

- a. To receive proper and prompt credit for your gift of securities to America's KESWICK, please contact Stanley C. Marsh, Director of Planned Giving, at 1-800-458-7942, x 32 (or email: smarsh@americaskeswick.org) or Allen Beltle, CFO, at 1-800-453-7942 (or email: abeltle@americaskeswick.org) with the following necessary information:
 - Your intention to donate your security to the ministries of America's KESWICK
 - The estimated date of the transfer
 - The name of your securities firm
 - The name and phone number of your broker
 - The intended purpose of your gift, i.e. Colony of Mercy, Women of Character, future residential Women's Addiction Center

2. DECIDE YOUR METHOD OF TRANSFERRING THE SECURITIES:

a. PHYSICAL DELIVERY OF STOCK OR BOND CERTIFICATE:

Securities, correctly completed with endorsement(s) or stock power(s), should be personally delivered or mailed registered, receipt requested, to:

America's KESWICK, Attention: Stan Marsh, 601 Route 530, Whiting, NJ 08759-3501.

If you need further instruction, please call 1 (800)453-7943 and ask for:

Stan Marsh @ x. 32 (or by email: smarsh@americaskeswick.org) or

Allen Beltle @ x. 19 (or by email: abeltle@americaskeswick.org)

NOTE: Please ***DO NOT*** send physical stock certificates to our Planned Giving partner, Ambassador Advisors, LLC.

b. ELECTRONIC TRANSFER OF SECURITIES: (ie, from a Brokerage Account)

Securities currently held in an existing brokerage account can be given directly to the following America's KESWICK brokerage account:

- Brokerage - Schwab
- DTC number - 0164
- Account name - America's KESWICK
- Account number - 6105-3833

c. ALL OTHER SECURITIES TRANSFERS OR QUESTIONS:

America's KESWICK has established a brokerage account with the following:

Ambassador Advisors, LLC

Attention: Amy Malay, 1755 Oregon Pike, Lancaster, PA 17601

Phone: 1-800-395-7660 ext.15; Email: amalay@ambassadoradvisors.com

3. RECEIVE PROPER & PROMPT CREDIT FOR YOUR GIFT

- a. We appreciate donors that give stocks, bonds, and other securities to America's KESWICK, and with the early communication of your intentions to donate securities, we can get the most market value from your gift.

NOTE: **It is the policy of America's KESWICK for all such gifts to be sold upon receipt.**