



GIFTS of SECURITIES to WASHINGTON NATIONAL CATHEDRAL UPDATED INSTRUCTIONS as of MARCH 2025

Thank you for your interest in making a gift of securities to Washington National Cathedral.

Washington National Cathedral is a division of the Protestant Episcopal Cathedral Foundation (PECF), the single legal entity for all organizations on the Cathedral Close (i.e., Washington National Cathedral, Beauvoir, the National Cathedral Elementary; St. Alban's School; and National Cathedral School). It is important that you specify "Washington National Cathedral" as the designee when making your gift of securities.

To ensure that your generosity is accurately recorded and promptly acknowledged, please notify the following contacts by email in advance of making your gift of securities. You may include all contacts on the same email communication.

giftofstock@cathedral.org Alerts the Cathedral Development Office of your intended gift.

Cynthia.Pierce@ML.com Alerts our receiving broker at Merrill Lynch of your intended gift.

For direct assistance from the Cathedral Development Office, please contact Michelle Jackson, Senior Manager of Gift Processing & Donor Services, at (202) 537-5535.

Please include the following information in your email communication:

1. The donor's name and mailing address (for issuance of a tax receipt)
2. The security name, ticker symbol, and number of shares of the security being donated
3. The allocation of the gift, such as Cathedral Fund (our annual operating fund) or other program support (music, worship, preservation, etc.)
4. Unless otherwise noted, the gift is assumed to be solely for Washington National Cathedral

Please provide the following information to your broker in order to make the securities transfer:

1. Receiving Broker: **Merrill Lynch**
2. DTC: **8862**
3. Beneficiary Account Number: **5UP-02252**
4. Beneficiary Name: **PECF/Cathedral**
5. Originator to Beneficiary Information: *Provide Donor Name Here*

Any stock gift transferred after December 31st will be treated as a donation in the next calendar year for tax-deduction purposes.

Please consult your tax advisor for additional guidance.