



## Making a stock gift to THE CLEVELAND ORCHESTRA

- The broker for The Cleveland Orchestra is **Merrill Lynch**:

Merrill Lynch  
30195 Chagrin Blvd  
Pepper Pike, OH 44124

Broker: Fred Watson

- Listed below are three ways to make a gift of stock to The Cleveland Orchestra.  
Please see instructions below for the manner in which you want to handle the transaction.

### 1) Direct Transfer from your broker to our broker (DTC Transfer)

- i) Notify The Cleveland Orchestra at **(216) 456-8400** or [donate@clevelandorchestra.com](mailto:donate@clevelandorchestra.com)
- ii) Provide the following information to your broker in order to transfer the stock to Merrill Lynch.
  1. DTC#: **8862**
  2. Account name: **Musical Arts Association**
  3. Account number: **617-02443**
- iii) Your gift will be valued the day that your stock is received in The Cleveland Orchestra's Merrill Lynch account.

### 2) Stock Certificate

- i) If the certificates are in your possession, you may either have them retitled in the name of the Musical Arts Association or send them **unendorsed**, by registered mail to The Cleveland Orchestra, ATTN: Development Department, 11001 Euclid Avenue, Cleveland, Ohio 44106.
- ii) In a separate envelope to the same address, send a letter of instruction stating that you wish to contribute the securities to the Orchestra, along with a signed, **but otherwise blank**, stock power form. If you need a letter of instruction or stock power form, we will be happy to send you one.
- iii) We will deliver the stock certificate and the stock power form to Merrill Lynch who will sell the stock and issue a check to The Cleveland Orchestra.
- iv) Your gift will be valued the day that your stock is received at The Cleveland Orchestra office.

### 3) You have an account at Merrill Lynch

- i) Call Fred Watson at 216-292-8095. He will facilitate the transfer of stock to the Orchestra.

**IMPORTANT: To ensure that you are properly credited and acknowledged for your gift, please call The Cleveland Orchestra with the specifics of your stock gift.**