

## GIFTS OF MUTUAL FUNDS

Gifts of Mutual Funds to Wabash College are a fine way to serve your philanthropic interests and to illustrate your loyalty to the College. Mutual Fund gifts also offer potential attractive tax benefits, but they can take considerably more time than for example, a simple stock transfer. Please consider these potential steps **to make a mutual fund transfer:**

1. Contact **Doug Smith at 765-361-6011 in the Wabash College Business Office** to let us know of the exact name of the mutual fund you would like to donate. We will check to see if our brokerage firm can hold that specific fund. If so, your mutual fund company can make a transfer right to Wabash's investment company - similar to a DTC transfer of stocks.
2. If our brokerage firm can hold the mutual fund, contact the shareholder customer service office at your mutual fund company to request that a transfer form be mailed or faxed to you, and follow their instructions. The company may request the following information about your transfer.

*Doug Smith  
Wabash College Business Office  
P.O. Box 352  
Crawfordsville, IN 47933*

**Wabash Federal Tax ID# 35-0868202**

3. If Wabash's investment company cannot hold the fund, Wabash will have to open an account with your mutual fund company and your company will have forms for you to complete to execute the transaction.

Once completed, you should send the following letter to assure that you receive proper credit for your gift.

Joe Klen  
Assistant Dean for College Advancement  
Wabash College  
P.O. Box 352  
Crawfordsville, IN 47933

Dear Mr. Klen:

I have made a gift to Wabash College by completing transfer forms from my Mutual Fund company, \_\_\_\_\_, to transfer \_\_\_\_\_ shares of \_\_\_\_\_.

This gift is intended for the Annual Fund (*or other purpose*).

Sincerely yours,

Your name \_\_\_\_\_  
Class of \_\_\_\_\_

Wabash College will issue an official gift receipt indicating the value of the gift on the day of the official transfer to Wabash's account. If you have questions about any of these instructions, please contact **Doug Smith at 765-361-6011**