

Making a stock gift to the Indianapolis Symphony Orchestra

- The broker for the Indianapolis Symphony Orchestra is **Raymond James & Associates, Inc.**
Raymond James & Associates, Inc.
1310 E. 96th St., Ste 200
Indianapolis, IN 46240
Phone: 317-573-1777 Fax: 573-1799
Broker: Joe Touchton
Assistant: Kathy Richardson Phone: 573-1775

 - Listed below are three ways to make a gift of stock to the Indianapolis Symphony Orchestra. Please see instructions below for the manner in which you want to handle the transaction.
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1. Direct Transfer from your broker to our broker (DTC Transfer)
 - a) Notify Tom McTamney, Gift Processing Associate, at the Indianapolis Symphony Orchestra at 317-229-7077.
 - b) Provide the following information to your broker in order to transfer the stock to Raymond James.
Please include donor name to Raymond James.
 - i) DTC# **0725**
 - ii) Account name: **Indiana Symphony Society** dba Indianapolis Symphony Orchestra
 - iii) Account #: **14494375**
 - iv) **NAME OF DONOR.**

 2. Stock Certificate
 - a) When the certificate is in the name of the Indianapolis Symphony Orchestra, please place in an envelope and deliver the *unsigned* stock certificate to Tom McTamney, Indianapolis Symphony Orchestra, 32 E. Washington Street, Suite 600, Indianapolis, IN 46204-2919. If the certificate is in someone else's name, please contact Tom McTamney at 317-229-7077 for instructions.
 - b) We will deliver the stock certificate and an Irrevocable Stock Power to Raymond James & Associates, Inc. who will sell the stock and issue a check to the Indianapolis Symphony Orchestra.
 - c) Your gift will be valued the day that your stock is received at the Indianapolis Symphony Orchestra Office, or received in the ISO's Raymond James account.

 3. You have an account at Raymond James & Associates, Inc.
 - a) Call Kathy Richardson at Raymond James, 317-573-1777. She will facilitate the transfer of stock to the Orchestra.
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- ***If you have any questions about making a stock gift, please call Tom McTamney, Gift Processing Manager at the Indianapolis Symphony Orchestra at 317-229-7077.***