



Stock Transfer Guidelines

Thank you for your interest in donating a gift of stock to The Speed Art Museum. While there are several ways to transfer appreciated securities to the Museum, we have found the most efficient method is a direct transfer, via DTC, from your brokerage account to the Museum's account at Schwab.

Many times, we do not receive identifying information from who transferred the stock gift to us. Because of this, it is important to follow all of the instructions below to make sure your gift is handled in a timely and efficient manner.

1. When you contact your Broker, please provide the following Stock Transfer information.
 - a. Stock Transfer Information:
 - Client Name: THE SPEED ART MUSEUM
 - Schwab Account Number: 3272-8167
 - Delivery instructions: DTC Clearing 0164, Code 40
 - b. Speed Art Museum's Broker:
 - Andrea Frey
 - Parthenon LLC
 - 502-327-5673
 - afrey@parthenonllc.com
2. Please contact the Speed Art Museum with advance notice of the stock transfer.
 - a. Speed Art Museum contact for stock transfer:
 - Kristina Gerard
 - 502-634-2983
 - kgerard@speedmuseum.org
 - b. Please provide the following information:
 - Number of shares
 - Stock Description
 - Estimated value of stock
 - Designation for the gift (i.e. Annual gift, pledge payment, etc.)