



## **Transfer Instructions for Contributions to National Wrestling Hall of Fame Endowment Fund (NWHOFEF)**

### **Cash:**

Donor should **hand-deliver** cash directly to the offices of Tulsa Community Foundation or the National Wrestling Hall of Fame & Museum with a signed note indicating the National Wrestling Hall of Fame Endowment Fund, Account Number 91-0061-TU-4. Special instructions should also be included if necessary.

### **Checks:**

Donor should **mail** or **hand-deliver** checks to the offices of TCF (7030 S. Yale, Suite 600, Tulsa, OK 74136) or the National Wrestling Hall of Fame & Museum. Include a signed note indicating the National Wrestling Hall of Fame Endowment Fund, Account Number 91-0061-TU-4. Special instructions should also be included if necessary. Make checks payable to: **National Wrestling Hall of Fame Endowment Fund** and include the account number in the memo field.

### **Wire Cash:**

*Call TCF prior to the free delivery.* The following wiring instructions are for donor or donor's financial representative:

- ◆ Bank of Oklahoma, N.A.
- ◆ ABA #1039-00036
- ◆ Credit Account #600024642 – Trust Funds
- ◆ FBO: Tulsa Community Foundation, National Wrestling Hall of Fame Endowment Fund, Account Number 91-0061-TU-4
- ◆ Attn: Bonnie Mowrer or Margaret Kobos

### **Wire Stock, Corporate Bonds, and other Marketable Securities:**

*Call TCF prior to the free delivery.* Specifically, TCF needs the following information:

- ◆ Number of shares being transferred
- ◆ Name of security being transferred (i.e., company name and trading symbol)
- ◆ CUSIP Number

The following instructions are for donor or donor's financial representative:

- ◆ Participant (or DTC) #901 – The Bank of New York
- ◆ Account #016071 – Bank of Oklahoma, Trust Department
- ◆ FBO: Tulsa Community Foundation, National Wrestling Hall of Fame Endowment Fund, Account Number 91-0061-TU-4.

### **Wire Government Securities, including Treasury Bills, Notes, Bonds and FNMA's:**

Call TCF prior to the free delivery. The following instructions are for donor or donor's financial representative:

- ◆ Bank of Oklahoma – Tulsa/Trust
- ◆ ABA #1039-00036
- ◆ (must use receive code "TRUST")
- ◆ FBO: Tulsa Community Foundation, National Wrestling Hall of Fame Endowment Fund, Account Number 91-0061-TU-4.

### **Mutual Funds:**

Call TCF prior to the impending wire. Specifically, TCF needs the following information:

- ◆ Number of shares being transferred
- ◆ Name of mutual fund being transferred (i.e., company name and trading symbol)
- ◆ CUSIP Number
- ◆ Name and telephone number of the individual broker representing your donor

*Processing time for gifts of mutual funds will vary, depending on whether or not TCF's financial manager has an active account open for the mutual fund being transferred.*

### **Physical Stock Certificate:**

Donor should:

- ◆ Hand-deliver certificate and accompanying Assignment\* to TCF offices, or should mail certificate **separate** from Assignment\* (copy the Assignment on the following page for your donor) to Tulsa Community Foundation.
- ◆ *It is **very important** that the certificate and Assignment\* be mailed separately, as neither is negotiable without the other.*
- ◆ Donor should include a signed note indicating National Wrestling Hall of Fame Endowment Fund, Account Number 91-0061-TU-4.

\*Donor **must** have the Assignment **medallion guaranteed** at any brokerage house or national bank prior to mailing or hand-delivery.

### **Privately-held Securities:**

TCF needs the following information:

- ◆ Number of shares being transferred
- ◆ Name of privately-held company being transferred
- ◆ CUSIP Number
- ◆ Name and telephone number of the individual broker representing donor

### **Planned Gifts:**

NWHOF and TCF need the following information:

- ◆ Copy of signed document (i.e. Will, Revocable Trust, Charitable Trust, change of owner/beneficiary form for life insurance or retirement account, etc.)
- ◆ In lieu of a signed copy of the document, NWHOF and TCF will accept a signed Gift Verification Form
- ◆ Date of Birth of Donor(s)

Please use the following legal name depending upon the type of gift designation used:

- ◆ If the gift is going to **NWHOFEF**: National Wrestling Hall of Fame & Museum [23-7233488].
- ◆ If you choose to have the TCF distribute your gifts to other Donor Advised Funds, Donor Designated Funds, Agency Funds, etc...please contact the TCF staff at 918-494-8823.

**For IRA Rollover Gifts:**

1. The Donor (Plan Participant) should contact TCF or NWHOF advising them a gift is being transferred to NWHOFEF account along with the approximate dollar amount.
2. Wire **Stock, Corporate Bonds, and other Marketable Securities:**  
*Call TCF prior to the delivery.* Specifically, TCF needs the following information:
  - ◆ Number of shares being transferred
  - ◆ Name of security being transferred (i.e., company name and trading symbol)
  - ◆ CUSIP Number
3. The following instructions are for donor or donor's financial representative:
  - ◆ Participant (or DTC) #901 – The Bank of New York
  - ◆ Account #016071 – Bank of Oklahoma, Trust Department
  - ◆ FBO: Tulsa Community Foundation, National Wrestling Hall of Fame Endowment Fund, Account Number 91-0061-TU-4

**IRA Minimum Distribution Gifts:**

Please refer to Check or Wire Cash instructions above. Please note, the donor must be age 70.5 or older at the time of distribution and the gift must go directly to either a Donor Designated or Agency Fund as gifts to Donor Advised Funds are not permitted per IRS regulations.

**Sample Language for Bequests to NWHOF Endowment Fund**

“I give, devise, and bequeath to Tulsa Community Foundation, Inc. (Tax ID number 73-1554474), an Oklahoma not-for-profit corporation, (a sum of money, percentage of my estate, the full value of my IRA, or description of the gift). This gift is to be used exclusively to fund and/or augment the National Wrestling Hall of Fame Endowment Fund.”