NONPROFIT LOGO

Donor Directions for Gifts of Stock

Donor name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Instructions to donor:

* Contact your broker and give direction for donating stock:
  + Name of stock \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Number of shares \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Name and phone of broker \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Send a copy of this completed form to (nonprofit name) at (email)
  + Purpose of donation:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Instructions to Broker:

* Electronic transfer stock to the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(nonprofit’s name) account at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(nonprofit’s brokerage firm)
* DTC #\_\_\_\_\_\_\_\_
* FBO (nonprofit) #\_\_\_\_\_\_\_\_\_\_\_\_

If you have any questions or concerns, please feel free to contact:

* (Nonprofit contact information)
* (Contact information of brokerage firm receiving stock)

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