



DOING THE MOST GOOD

## HOW TO GIVE A GIFT OF STOCK

Following are instructions for “*Electronic Transfer*” of stock via the DTC system. This is the most efficient way to receive securities if you give securities that are held in street names (book entry) at your bank or broker.

**Contact Person:** Jorja Watts (412) 234-0439  
BNY Mellon Capital Markets  
**DTC Number:** 0443  
**Heartland Account:** N7M001756

Please let Lori Coffey, Development Department Administrative Coordinator (309-655-1346) know the stock has been donated so that we can send you a letter of confirmation for tax purposes. We need to know the name of the stock, the date of the transaction, the number of shares, approximate value, designation of donation, donor name, address, city, state, zip, and telephone numbers. You can do this in one of the following ways:

1. Call the Planned Giving Department at (309) 655-1346.
2. Email your information to [Lori\\_Coffey@usc.salvationarmy.org](mailto:Lori_Coffey@usc.salvationarmy.org)
3. Complete and return the form below.

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### RECORD OF STOCK DONATION

Date of Gift: \_\_\_\_/\_\_\_\_/\_\_\_\_

Broker: \_\_\_\_\_

Donors Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: (\_\_\_\_) \_\_\_\_\_ Business Phone: (\_\_\_\_) \_\_\_\_\_

Company Name of Stock: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Approx. Market Value: \_\_\_\_\_

Designation of the Gift: \_\_\_\_\_

The Salvation Army DHQ, 401 NE Adams St., Peoria, IL 61603 Phone: 309-655-7220 Fax: 309-655-7271

Visit us online at [www.SAgift.org](http://www.SAgift.org)