



GIFT OF STOCKS, BONDS, OR MUTUAL FUNDS

Thank you for making a donation of stocks, bonds, or mutual funds to the Humane Society of Southern Arizona. You will receive a formal acknowledgment and tax substantiation upon our receipt of your gift.

- 1. Please complete the attached form, then:**
 - a. Send a copy to: Humane Society of Southern Arizona,
Attn: Diana Cannon, Chief Development Officer,
635 W. Roger Rd., Tucson, AZ 85705,
520-327-6088 x117, dcannon@hssaz.org
 - b. Forward a copy to your broker or financial advisor to initiate the gift.

- 2. For securities to be delivered via DTC or ACAT transfer, please send to:**

Merrill Lynch, Pierce, Fenner & Smith Incorporated
Attn: Helene Plotz, SLS Wealth Management,
helene_plotz@ml.com, 520-747-6186
DTC#: 8862 Account#:410-02585
Client Name: Humane Society of Southern Arizona

- 3. Questions? Please contact Diana Cannon, Chief Development Officer, 520-327-6088 x117, dcannon@hssaz.org.**

- 4. The Federal Tax I.D. number for the Humane Society of Southern Arizona is 86-0112798.**

GIFT OF STOCKS, BONDS, OR MUTUAL FUNDS

DONOR

Name(s) _____

Mailing Address _____

City _____

State _____

Zip Code _____

Phone _____

Email _____

STOCK GIFT DETAILS

Name of Security _____

Ticker _____

Quantity (# of Shares) _____

DELIVERING BROKER OR FINANCIAL ADVISOR

Anticipated Date of Transfer _____

Brokerage Firm _____

Contact Name _____

Contact Phone _____

SPECIAL INSTRUCTIONS OR RESTRICTIONS and SIGNATURE

Special Instructions _____

Any Restrictions _____

SIGNATURE: _____

DATE: _____

BROKER OR FINANCIAL ADVISOR DELIVERY INSTRUCTIONS

For securities to be delivered via DTC or ACAT transfer, please send to:

Merrill Lynch, Pierce, Fenner & Smith Incorporated

Attn: Helene Pltz, SLS Weath Management

(helene_plotz@ml.com 520-747-6186) DTC#: 8862 Account#: 410-02585

Client Name: Humane Society of Southern Arizona