



GIFT OF STOCKS, BONDS, OR MUTUAL FUNDS

Thank you for your support of pets and people who love them.

These instructions will help facilitate your donation of stocks, bonds, or mutual funds to HSSA. You will receive a formal acknowledgement and tax substantiation upon our receipt of your gift.

COMPLETE THE ATTACHED FORM

- Mail a copy to:
Humane Society of Southern Arizona
Attn: Karen Hollish, Chief Development Officer
635 W Roger Rd., Tucson, AZ 85705

OR

- Email a copy to:
Karen Hollish, Chief Development Officer at khollish@hssaz.org
- Forward a copy to your financial advisor/broker to initiate the gift.

FOR SECURITIES TO BE DELIVERED VIA DTC OR ACAT TRANSFER

- 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

HSSA FEDERAL TAX ID

- 86-0112798

QUESTIONS?

- Contact:
Karen Hollish, Chief Development Officer at (520) 327-6088 x117 or khollish@hssaz.org



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DONOR INFORMATION

Name: _____
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

Special Instructions: _____
Any Restrictions: _____

Signature: _____ Date: _____

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