

Thank you so much for considering a gift of stock.

Your generous gift will help so many animals!

**It’s Easy to Make a Gift of Stock to the Upper Valley Humane Society!**

There is a lot of information contained here but rest assured, this is quite a simple process. First, notify UVHS of your gift. Second, determine whether your financial institution offers an omnibus charitable gift account or if they will transfer the stock directly to UVHS’ account at Vanguard. Then, sit back and know you’ve made a huge difference for animals in need!

1. **Notify UVHS** by emailing or calling Carrie at carrie@uvhs.org or (603) 448-6888 x100. Provide your name, address, the name of the name of the stock to be gifted, and the number of shares or units. This step is important so that UVHS can ensure we receive your gift and provide you with a tax receipt for your charitable donation.
2. If your financial institution has an **omnibus charitable gift account** in which it can accept gifts of stock on behalf of a charity, sell the stock, and send the proceeds to the charity, have your financial advisor contact Carrie at UVHS. Your advisor will need the consent of the organization to accept the gift via the omnibus charitable gift account.

or

1. If your advisor prefers to **send the stock directly to Vanguard**, where UVHS has a brokerage account to receive stock, please work with them to complete the Donation of Stock form on the following page of this document.

**Thank you again for supporting UVHS and the animals in our care.**



**Donation of Stock – Transfer Form**

To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Your Stock Broker)

At: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Your Brokerage Firm)

**Donation Information**

Your Account Number at Brokerage Firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stock Contribution (Name of Stock): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of Shares to be Donated: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Estimated Amount of Donation: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Charity’s Information**

Name of Charity: Upper Valley Humane Society

DTC # at Charity: 0062

Broker: Vanguard

Account #: 77038454

**Authorization**

Please Sign & Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

 Date

Print Your Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Contact Information for UVHS: Contact Information for UVHS’ Broker:**

Carrie Hamel, Assistant Director Vanguard: 1-800-662-2739

603-448-6888, ext. 100

Carrie@UVHS.org