



Stock Transfer (DTC) Instruction Form

Thank you for your interest in making a charitable gift to Kentucky Humane Society (KHS) in the form of a stock or bond. **Please complete and return the second page of this form to receive your tax-acknowledgement.**

DTC Wiring Instructions:

FBO: Kentucky Humane Society
DTC #0443
Account#IF4005573
KHS Tax ID # 61-0463938

If you have questions or need additional information, please contact:

Lori Edge

Lifetime Wealth Strategies
9700 Bunsen Parkway | Louisville, KY 40299
Phone: (502) 267-5433
Fax: (502) 384-4901
Lori@contactlws.com

Kristin Binkowski

Development Manager
Kentucky Humane Society
1000 Lyndon Lane, Suite B | Louisville, KY 40222
Direct: (502) 515-3147
Fax: (502) 425 4230
kbinkowski@kyhumane.org

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to KHS. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

GIFT OF STOCK FORM

Important – because donor information does not transmit through the DTC wiring system, please email this completed form to kbinkowski@kyhumane.org or mail to: Attn Kristin Binkowski, Kentucky Humane Society, 1000 Lyndon Lane Suite B, Louisville KY 40222.

DONOR & SECURITIES INFORMATION:

Donor Name(s): _____

Address: _____

City / State / Zip: _____

Email / Phone: _____

I/we prefer to remain anonymous.

Name of Stock: _____

Number of Shares: _____

Transfer Date: _____

Broker Name: _____

Broker Company / City / State: _____

Contact / Telephone Number: _____

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering KHS as the recipient of your charitable gift.

