

# 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:**

### **Pershing Financial**

Account #: **IF4005573**

DTC #: **0443**

FBO: **Kentucky Humane Society**

Tax ID #: **61-0463938**

**If you have any questions or need additional information, please do not hesitate to contact:**

### **Lori Edge**

Lifetime Wealth Strategies

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lori@contactlws.com

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Development Director

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development@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.

**Important** – Donor information does not transmit through the wiring system, please complete the form below so we may properly acknowledge your gift. You may also follow up with an email to [development@kyhumane.org](mailto:development@kyhumane.org) with this information.

**DONOR AND 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: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

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 or visit <https://www.kyhumane.org/employer-matches/> 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.**

