

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

9700 Bunsen Parkway, Louisville, KY 40299

Phone: (502) 267-5433 | Fax: (502) 384-4901

lori@contactlws.com

Savannah Gregorchik-Menendez

Development Director

Kentucky Humane Society

1000 Lyndon Lane, Louisville, KY 40222

Direct: (502) 515-3147 | Fax: (502) 425 4230

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.

Gift of Stock Form

Important – Donor information does not transmit through the DTC wiring system, please email this completed form to **development@kyhumane.org** or mail it to 1000 Lyndon Lane Louisville, KY 40222 so that KHS can appropriately acknowledge your gift

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: _____

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.

