

Thank you for your interest in donating stock to the Animal Protection Society of Durham. To effectively transfer the securities, please follow these instructions as appropriate to your situation.

- A.) If you have physical possession of the stock certificates, you should send the certificates (unendorsed) in one envelope and a blank stock powers form with the signature(s) of the stock owner(s) as they appear on the certificates, in another envelope, to the following address:

Animal Protection Society of Durham
Development Director
2117 E. Club Blvd.
Durham, NC 27704

- B.) If you do not have physical possession (a situation sometimes known as a broker “street account”) then you can instruct your broker to transfer the stock electronically through Depository Trust Company (DTC). Listed below is our broker’s information and please instruct your broker to transfer the appropriate number of shares to:

Greg Archer
Edward Jones
2110 South Miami Blvd.
Durham, NC 27703
919-596-4696

Animal Protection Society of Durham Account # 192-1293716
DTC # 0057

In order to ensure a smooth transfer, it is vital that the APS of Durham’s Development Office is notified of your intentions before the transaction occurs. Prior to instructing your broker, please call us and provide the following information, or send us the letter outlined below:

- 1) The name of the issuer and/or symbol
- 2) The number of shares being transferred
- 3) The anticipated date of transfer

In accordance with IRS guidelines, the date of the gift will be the date that APS of Durham assumes ownership of the shares. For crediting purposes, the value is determined as the average of high and low listings for the stock on that date.

If you or your broker has any questions or needs more information, please contact Darlene Fiscus, Director of Development & Marketing at Development@APSoFDurham.org or (919) 560-0640 extension 231.

SAMPLE LETTER

<Month Date, Year>

<Donor Name>

<Address Line 1>

<Address Line 2>

<City>, <State> <ZipCode>

Donor's Broker
Brokerage Firm
Address

Dear Broker:

This is my formal request to you to please transfer from my account # _____ to the brokerage account of the Animal Protection Society of Durham (c/o Edward Jones, DTC #0057, Account # 192-1293716), a charitable donation of ____ shares of _____.

A copy of this letter has been sent to the Animal Protection Society of Durham and to their broker, Greg Archer at Edward Jones in Durham.

This is an unrestricted gift to the Animal Protection Society of Durham and may be used in whatever way best suits the needs of the APS. (OR, this gift is restricted for *specific program or service*).

Sincerely,

Donor Name

CC:

Darlene Fiscus, APS of Durham, 2117 E. Club Blvd. Durham, NC 27704

Greg Archer, Edward Jones, 2110 South Miami Blvd. Durham, NC 27703