



Instructions for Transferring Securities to

Washington Heritage Museums

1300 Charles Street, Fredericksburg, VA 22401
540-373-5630 | ADarron@WashingtonHeritageMuseums.org

Please complete the following:

Name: _____

Address: _____

City, State, Zip: _____

Primary Phone: _____

Description of Securities (type and number of shares to be transferred): _____

Approximate Value: _____

Investment Firm: _____

Broker Name: _____ Phone: _____

Please contact your broker and provide them with the following information:

Washington Heritage Museums' Broker: Stifel, DTC number: 0793

Account Manager: Mr. Don Newlin, Phone: 540-373-1821

WHM Tax ID: 460803504

Because donor information does not transmit through the DTC wiring system, please have your broker add your name to the DTC transfer ticket.

Please send this completed form via email or fax to:

Anne Darron, Executive Director Washington Heritage Museums

ADarron@WashingtonHeritageMuseums.org

540/373-5630 Office Phone/Fax

Please note: For tax purposes, the gift date is recognized as the date of transfer. Your gift will be valued based on the average price (the mean between the highest and lowest selling prices) of the stock on the date received.

Washington Heritage Museums is a 501c3 organization. Contributions to Washington Heritage Museums are tax deductible as allowed by law. Please see your tax advisor for deductibility.

Signature: _____ Date: _____