



# Instructions for Transferring Securities to Washington Heritage Museums

1300 Charles Street, Fredericksburg, VA 22401  
540-373-5630 | [ADarron@WashingtonHeritageMuseums.org](mailto:ADarron@WashingtonHeritageMuseums.org)

*Thank you for your desire to donate appreciated securities to Washington Heritage Museums. Please complete the following to notify WHM of your upcoming gift:*

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ (H) \_\_\_\_\_ (C)

I wish to transfer the following (number and type) of shares:

\_\_\_\_\_

Approximate Value: \_\_\_\_\_

Investment Firm: \_\_\_\_\_

Broker Name: \_\_\_\_\_ Phone: \_\_\_\_\_

\_\_\_\_ My gift is unrestricted      \_\_\_\_ My gift is temporarily restricted for the following purpose:

\_\_\_\_\_

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

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

Account Manager: Norma Sellors, Phone: 804-643-2400

WHM Tax ID: 46-0803504

*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:

Attention: Anne Darron, Executive Director Washington Heritage Museums

[ADarron@WashingtonHeritageMuseums.org](mailto:ADarron@WashingtonHeritageMuseums.org)

540/373-5630 Office Phone/Fax

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please note: For tax purposes, the gift date will be 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.*