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## INSTRUCTIONS FOR MAKING A GIFT OF STOCK TO ANN'S HEART

Thank you for considering making a gift of stock to Ann's Heart.

Making a stock gift is a great way to support the work of our organization. The transaction is simple and straightforward, has an immediate impact, and may also have tax benefits. Please follow the instructions below to transfer stock and/or other securities to Ann's Heart.

1. Inform the Ann's Heart office of your intention to transfer securities.  
Be prepared to provide the following information:
  - a. Donor name, address, phone number and e-mail address;
  - b. Name of stock and number of shares;
  - c. The gift designation;
  - d. The anticipated date of transfer
  
2. Provide your broker the account information for making an electronic transfer:  
Brokerage Firm: Fidelity  
DTC #: 0226  
Account Name: Ann's Heart  
Account #: Z50729027
  
3. Once your broker has advised you that your transfer is complete, please notify the Ann's Heart office so they may confirm receipt of the gift.

Once the assets are in our account, there are no additional steps! Ann's Heart will authorize Fidelity to sell the shares and will send the donor an acknowledgment indicating the cash value of the gift.

Please contact Peter Urscheler, Development Director, at (484) 393-2407 or via email at [peter@annsheart.org](mailto:peter@annsheart.org) for all stock transfer activities and inquiries.

Thank you for your support!