



DOING THE MOST GOOD

HOW TO GIVE A GIFT OF STOCK

A gift of appreciated securities to The Salvation Army could save your client capital gains taxes and provide a beneficial tax deduction. Following are instructions for “*Electronic Transfer*” of stock via the DTC system. This is the most efficient way to receive securities when you give securities that are held in street names (book entry) at your bank or broker.

Contact Person: **Bob Mache (312) 269-5050 or**
 Briana Best (312) 269-5034
 Merrill Lynch Management., Chicago, IL

DTC Number: **5198**

Heartland Account: **8GD-02008**

Please let Lori Helvick, Planned Giving Administrative Assistant (309-655-1346) know the stock has been donated so that we can send you a letter of confirmation for tax purposes. We need to know the name of the stock, the date of the transaction, the number of shares, approximate value, designation of donation, donor name, address, city, state, zip, and telephone numbers. You can do this in one of the following ways:

1. Call the Planned Giving Department at (309) 655-1346.
2. Email your information to lori_helvick@usc.salvationarmy.org
3. Complete and return the form below.

RECORD OF STOCK DONATION

Date of Gift: ____/____/____

Broker: _____

Donors Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: (____) _____ Business Phone: (____) _____

Company Name of Stock: _____

Number of Shares: _____ Approx. Market Value: _____

Designation of the Gift: _____

The Salvation Army DHQ, 401 NE Adams St., Peoria, IL 61603 Phone: 309-655-7220 Fax: 309-655-7271
Visit us online at www.SAgift.org