



## Stock Donation Instructions

- If you would like to make a gift of stock to the Greenville Humane Society, we would be happy to provide stock transfer instructions to you. It is a simple, straightforward process.
- You can call or write to your broker and ask to initiate a “broker to broker” transfer. You would instruct your broker to donate the stock directly to the Greenville Humane Society.
- Your broker will need to contact the Greenville Humane Society’s financial advisor Jeff Herman at Wagner Wealth Management (864-236-4706).
- Your broker can then transfer the securities directly to the Greenville Humane Society’s account. It is important that the securities be transferred to the Greenville Humane Society’s account **prior to being sold** in order to **avoid capital gains taxation**.
- Your broker will need the following information pertaining to the Greenville Humane Society account:
  - DTC # 0164, Code 40
  - Account # 5383-8607
- *It is helpful if you alert Erin Simmons as to the stock name and shares being sold since brokers often do not put their client’s name on the wire transfer. We want to thank our donors for their support.*
- To begin this process, please contact our Donor Relations Coordinator, Erin Simmons, at [ErinS@GreenvilleHumane.com](mailto:ErinS@GreenvilleHumane.com) or (864) 263-5606.