



## **Stock Transfer Instructions**

### **Introduction**

Please inform the Philanthropy department at Native Plant Trust each time you intend to make a donation of stock to us. Frequently a transfer between brokers occurs with insufficient information to correctly identify you as the donor. The following instructions will greatly help to ensure you receive full credit for your generous contribution. Thank you.

### **Information needed by Native Plant Trust**

Your name

The type of stock and quantity – e.g. 42 shares of IBM

The stock transfer date (or intended transfer date)

How you want the donation to be used (the designation) – e.g. to support the conservation dept.

Is this donation a payment toward a pledge?

Is this donation anonymous?

Your agent's name, contact details, and brokerage firm (not essential but very helpful)

### **Information needed by your broker**

DTC Number: 0062

For the Benefit of: Native Plant Trust, Inc. Brokerage Account

Vanguard brokerage account number: 56363408

### **Contact information**

Philanthropy Department

Native Plant Trust

321 Commonwealth Road, Ste. 204

Wayland, MA 01778

774-519-5570 or 774-519-5553

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