

# WINSTON SALEM SYMPHONY

## STOCK DONATION FORM

Thank you for considering a gift of stock to the Winston Salem Symphony. Donating shares of appreciated securities is an excellent means of providing a tax-deductible donation and generally avoids long-term capital gains tax. Please consult with your tax advisor. We request that stocks be gifted via DTC transfer (electronic transfer from your brokerage to our brokerage) to minimize paper transactions and processing delays.

### To make a gift of stock:

- 1) Please fill out the information below and contact your broker to initiate a stock donation via electronic DTC transfer. Your broker will need the following information to transfer stock directly to the Winston Salem Symphony.

**Winston Salem Symphony Brokerage:** Wells Fargo Advisors (DTC #0141)  
**Account Number:** 8514-6552  
**Account Name:** The Winston Salem Symphony (Federal Tax ID: 56-0692826)  
**Wells Fargo Broker:** John Cox (336) 721-4231  
[John.cox1@wellsfargoadvisors.com](mailto:John.cox1@wellsfargoadvisors.com)

- 2) Please contact the Winston Salem Symphony to let us know that you are making this gift so that we can confirm receipt and thank you. This is particularly important since we DO NOT receive the donor's name in the electronic transfer. **Please send this form to Marianne:** [mdecristo@wssymphony.org](mailto:mdecristo@wssymphony.org).
- 3) Please call (336) 725-1035 ext. 210 for additional information.

### DONOR INFORMATION

Name of Donor(s): \_\_\_\_\_

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

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Donor(s) Signature: \_\_\_\_\_

Gift Designation: \_\_\_\_\_

(Will be directed to support the Annual Fund if left blank)

### STOCK DONATION / BROKERAGE INFORMATION

Date of Transfer \_\_\_\_\_ Approximate Dollar Value \_\_\_\_\_

Name of Security: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

Brokerage Firm: \_\_\_\_\_

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

*Thank you for your generous support of the Winston Salem Symphony!*

Winston Salem Symphony | P.O. Box 1545, Winston-Salem, NC 27102 | (336) 725-1035