



Triangle Family Services

STOCK DONATION INSTRUCTIONS

Triangle Family Services gratefully accepts stock donations. Gifts of stock may be made via electronic transfer. Triangle Family Services maintains a brokerage account with Fifth Third Securities for the purpose of processing stock transfers to Triangle Family Services. **Triangle Family Services cannot initiate stock transfers on your behalf. You must contact your broker directly. If Triangle Family Services does not receive this form, we may be unable to identify electronically-transferred stock.**

PLEASE PROVIDE ALL INFORMATION REQUESTED.

NOTICE OF STOCK DONATION:

Your Name: _____

Your Address: _____
(Street) (City) (State) (Zip)

Phone: _____ Email address: _____

Name of stock and number of shares donated: _____

If securities are electronically transferred, the gift date is the date the securities enter our account at Fifth Third. For securities hand-delivered to Triangle Family Services, the gift date is the date received by Triangle Family Services. If the securities are mailed to Triangle Family Services, the gift date is the date of the mailing (recommend sending by registered mail). Stock market fluctuations after the date of delivery (as defined above) will not affect the charitable deduction for tax purposes.

Triangle Family Services will sell stock as soon as possible (usually by the business day following the receipt of the stock). The net proceeds will be affected by the actual sale price, as well as a broker charge to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceeds applied from the gift. Triangle Family Services cannot be responsible for any variance in these amounts.

Please send copies of Pages 1 and 2 to:

Triangle Family Services, Inc.
Attn: info@tfsnc.org
Director of Grants & Major Gifts
3937 Western Boulevard
Raleigh, NC 27606
alutz@tfsnc.org

A. ELECTRONIC TRANSFER BY BROKER

Please communicate the following information to your broker to initiate the stock transfer

To: _____
(Broker's Name & Company)

Please transfer _____ shares of _____ stock

from my account to:

Fifth Third Securities, Inc.
2501 Blue Ridge Road Suite 190
Raleigh, NC 27607
Jackie Williams or Marshall Hunter
Jacqueline.Williams2@53.com
hunter.marshall@53.com

919.573.7806

I / we hereby authorize the above stock transfer:

(Signature) (Date) (Signature) (Date)

B: DIRECT DONATION OF CERTIFICATE

1. If certificate is titled in the **name of the donor**:
 - a. Your signature(s) on the certificate **MUST be medallion guaranteed**. Please do not fill in any other information on the certificate. The medallion guarantee of your signature can be done at most financial institution (bank branches, brokerages, etc).
 - b. Include a "letter of intent" with your name, address, stock and shares and intent (e.g., donation to Triangle Family Services).
 - c. Send by registered mail (or deliver) to Triangle Family Services. Send copy of this two-page completed form to Triangle Family Services.
 - d. Alice Lutz (919.821.0790 x 107) if you have questions or need assistance.

2. If certificate is titled in the **name of Triangle Family Services, Inc.:**
Send by registered mail (or deliver) to Triangle Family Services, along with this two-page completed form.