



## **Stock Donation Instructions**

Thank you for your interest in making a stock donation to Albertina Kerr. The following is the information that your brokerage firm will need in order to make the stock transfer.

**Account Name:** Albertina Kerr Foundation - Endowment

**Clearing Firm:** U.S. Bank

**Account Number:** 080018589000

**DTC:** 2803

**Albertina Kerr Brokerage Contact Name:** Michael P. Davis, JD LLM

**Phone:** 503.464.4909

Attached you will find a request template that you can complete and copy onto your letterhead to fax or scan to your broker.

Please notify Albertina Kerr at 503-262-0175 or [development@albertinakerr.org](mailto:development@albertinakerr.org) when you have requested the stock transfer. Once we receive the transfer, we will promptly acknowledge receipt of your gift

## Stock Transfer Request

Date: \_\_\_\_\_

From: \_\_\_\_\_ (Donor's Name)

To: \_\_\_\_\_ (Your Brokerage Firm)

Attention: \_\_\_\_\_ (Broker Name)

Fax Number: \_\_\_\_\_ (Broker's Fax)

Please transfer \_\_\_\_\_ (# SHARES) of \_\_\_\_\_ (STOCK NAME)

From my account # \_\_\_\_\_

To the following account:

Account Name: Albertina Kerr Center Foundation (501(c)(3)#: 93-1297104)

Broker: U.S. Bank

Account Number: 080018589000

DTC: 2803

Albertina Kerr Brokerage Contact Name: Michael P. Davis

Phone: 503.464.4909

This is a stock gift. If you have any questions, please contact me.

Sincerely,

\_\_\_\_\_ (Donor's Signature)

\_\_\_\_\_ (Donor's Address)

\_\_\_\_\_ (email or phone number)