



## Gift of Mutual Funds

### Broker Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

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

### Broker Instructions

Please gift shares of stock from my account per the following:

Account #: \_\_\_\_\_

Fund Name/Symbol: \_\_\_\_\_

Quantity of Shares: \_\_\_\_\_

### Please transfer shares of mutual funds to:

**Wisdom for the Heart**

Account held at BB&T Securities (Scott & Stringfellow)

**Account Number: 87466046**

**DTC#: 0702**

**Tax ID: 56-2244684**

### Donor Information

Owner/Co-Owner: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

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

Owner Signature & Date: \_\_\_\_\_

Co-Owner Signature & Date: \_\_\_\_\_

### Please do the following:

- Scan and send this form to [giving@wisdomonline.org](mailto:giving@wisdomonline.org) or fax to (919) 852-5740 to inform the ministry of the transfer
- Provide this original form to your broker if you are using it to initiate the transfer with your broker (your broker may have a different form that will be used to request the transfer from them)

**IMPORTANT NOTE TO DONORS:** Due to privacy regulations, your Broker will not provide us with your name. We are unable to identify you as the donor or provide a receipt unless we receive this form.