



Gift of Stock by Electronic Transfer

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 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 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.