



Making a Gift of Stock to Upper Valley Music Center

We are delighted that you are interested in making a gift of stock to Upper Valley Music Center. Your gift will help many people make music. Please follow these steps to complete your gift:

- 1) Talk to your broker about the value of the gift you would like to make to the Upper Valley Music Center and about which securities to donate for that purpose.
- 2) Provide written instructions to your broker, including the following delivery information for transferring securities to Upper Valley Music Center:

Brokerage:

Tim Fisher, *Managing Partner*
Fisher Financial Advisors, LLC.
64 Lyme Road
Hanover, NH 03755
603.643.4448
tim@fisherfinancialadvisors.com

Account Name: Upper Valley Music Center

Account Number: 9610-4721

DTC Clearing: 0164, Code 40

Federal Tax ID #: 03-0345579

(Additional delivery information on reverse)

- 3) Please send UVMC a copy of the instructions to your broker:

Benjamin Van Vliet, *Executive Director*
Upper Valley Music Center
PO Box 826
Lebanon, NH 03766
603.448.1642 x3
ben@uvmusic.org

Upper Valley Music Center is a non-profit organization qualified under section 501(c)3 of the Internal Revenue Code. Giving appreciated stock held for more than 12 months offers a two-fold tax savings: first, you avoid paying capital gains tax on the increase in value of your stock. In addition, you receive a tax deduction for the full fair market value of the stock on the date the securities are transferred to the charity.

Thank you!



Additional Delivery Information

All OTC-Eligible Securities:

All deliveries MUST include Account Name and Account Number along with:

DTC Clearing 0164, Code 40

Physical Delivery of Securities:

All deliveries MUST include Account Name and Account Number along with:

Name and Address:

Charles Schwab & Co., Inc.
AS Document Control
P.O. Box 52114
Phoenix, AZ 85072-2114

Overnight Mailing Address:

Charles Schwab & Co., Inc
AS Document Control
2423 E. Lincoln Drive
Phoenix, AZ 85016

Fed Book-Entry Securities (i.e. Treasury Notes):

All deliveries MUST include Account Name and Account Number along with:

JPM CHASE/ CCC
ABA#: 021000021
Charles Schwab A/C: G69873
FBO: 8-digit customer A/C# and Name

Fedwire Monies:

All deliveries MUST include Account Name and Account Number along with:

Wire to: Citibank NA, 111 Wall Street, New York, NY 10005
ABA#: 021000089
FBO: Charles Schwab & Co/, Inc, A/C #: 40553953
For further credit to Schwab client Account #: 9610-4721