



## Stock Gift Form for Electronic Transfers

Please complete this form and email it to Heather Hackett, Director of Gift Planning, at [hhackett@appalachiantrail.org](mailto:hhackett@appalachiantrail.org), or call 772.546.1233 for further questions.

FIRST NAME \_\_\_\_\_ LAST NAME \_\_\_\_\_

STREET \_\_\_\_\_ APT \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ PHONE \_\_\_\_\_

E-MAIL \_\_\_\_\_

WHO OWNS THE TITLE OF THE STOCK (IF NOT THE DONORS) \_\_\_\_\_

NAME OF STOCK AND TICKERS SYMBOLS \_\_\_\_\_

NUMBER OF SHARES, OR APPROX. VALUE \_\_\_\_\_

HAVE YOU OWNED THESE SHARES FOR AT LEAST ONE YEAR? YES  NO

DELIVERING BANK/BROKERAGE AND DTC \_\_\_\_\_

BROKER NAME \_\_\_\_\_

BROKER PHONE NUMBER \_\_\_\_\_

BROKER EMAIL \_\_\_\_\_

### Instructions

**1. Instruct your broker** to transfer DTC-eligible shares with the following account information:

#### Transferee Information

Company Name: Appalachian Trail Conservancy, Inc.  
Mailing Address: PO Box 807, Harpers Ferry, WV 25425  
Federal Tax ID: 52-6046689  
Contact: Heather Hackett  
Contact Number: 772.546.1233

#### 2. Brokerage Information

Bank: U.S. Bank  
Account Name: Appalachian Trail Conservancy  
Account Number: 9565044  
DTC Code: 2803  
Contact: Megan Brune  
Contact Number: 410.537.5308

#### 3. Important:

Notifying Appalachian Trail Conservancy is the only way we can identify your gift when it is received to issue your tax receipt.

#### 4. Upon confirming transfer,

Appalachian Trail Conservancy will issue you a formal tax receipt of your contribution.

### THANK YOU FOR YOUR GIFT!

#### Benefits to making a gift of stocks, bonds, or mutual funds

- Receive an immediate charitable tax deduction for your gift.
- Eliminate capital gains taxes on the gifted securities.
- Support ATC's mission to protect and manage the Appalachian Trail.