GIFT OF STOCKS and SECURITIES

Gift Notification Form

Please complete and return before initiating a transfer with your broker.

RETURN THIS FORM TO: **StockGifts@HospitalityHub.org**

Federal privacy rules usually prevent your broker from sharing your name with us, so gifts of stock and mutual funds often arrive at our brokerage with no way to know who sent them. Completing this form first lets us identify you as the donor, apply your gift where you'd like, and send you a proper gift acknowledgement receipt, and it's how we're able to send you transfer instructions specific to your

YOUR INFORMATION

Donor Name(s)

Preferred Name for Gift Acknowledgment

Mailing Address

Email (confirmation will be sent here)

Phone

YOUR GIFT

Security Type (stock / mutual fund / bond / ETF)

Security Name / Ticker Symbol

Approximate # of Shares

Estimated Value of Gift

Anticipated Transfer Date

Your Brokerage Firm

Your Broker's Name

Your Broker's E-mail

Your Broker's Phone

ANYTHING ELSE WE SHOULD KNOW?

What happens next: Once we receive this form, we will email the address above to confirm the details and provide transfer instructions specific to your broker. Please wait for that email before directing your broker to transfer shares, this ensures the gift is received and is correctly credited to you.

To be eligible for a charitable deduction in a given tax year, we recommend initiating your transfers by December 18th to allow processing time. Gifts of this kind must be received in our account by December 31st.

THANK YOU!

Please return this form to StockGifts@HospitalityHub.org

Questions? Holly Ford, Chief Advancement Officer · 901-461-1167