



STOCK DONATION INSTRUCTIONS

Gifts of stock may be made via electronic transfer. Oak City Cares maintains a brokerage account with Fifth Third Securities for the purpose of processing stock transfers to Oak City Cares. **Oak City Cares cannot initiate stock transfers on your behalf. You must contact your broker directly. If Oak City Cares does not receive this form, we may be unable to identify electronically-transferred stock.**

PLEASE PROVIDE ALL INFORMATION REQUESTED:

NOTICE OF STOCK DONATION:

Your Name: _____

Your Address: _____
(Street) (City) (State) (Zip)

Phone: _____ email address: _____

Name of stock and number of shares donated: _____

If securities are electronically transferred, the gift date is the date the securities enter our account at Fifth Third. For securities hand-delivered to Oak City Cares, the gift date is the date received by Oak City Cares. If the securities are mailed to Oak City Cares, the gift date is the date of the mailing (recommend sending by registered mail). Stock market fluctuations after the date of delivery (as defined above) will not affect the charitable deduction for tax purposes.

Oak City Cares will sell stock as soon as possible (usually by the business day following the receipt of the stock). The net proceeds will be affected by the actual sale price, as well as a broker charge to process the transaction. Accordingly, there will be a variance between the charitable deduction amount and the net proceeds applied from the gift. Oak City Cares cannot be responsible for any variance in these amounts.

Please send copies of Pages 1 and 2 to:

Oak City Cares, Inc.
Attn: Kathryn Johnson, Executive Director
1430 S. Wilmington St.
Raleigh, NC 27603
Fax 984-344-9606

Kathy.johnson@oakcitycares.org

A. ELECTRONIC TRANSFER BY BROKER

Please communicate the following information to your broker to initiate the stock transfer

To: _____
(Broker's Name & Company)

Please transfer _____ shares of _____ stock from my
Account _____ to:

**Fifth Third Securities, Inc.
2501 Blue Ridge Road, Suite 190
Raleigh, NC 27607
Travis Harris – (919) 573-1992
Oak City Cares, Inc.
ACCOUNT 053-108759
DTC # 0226**

I / we hereby authorize the above stock transfer:

(Signature) (Date) (Signature) (Date)

B: DIRECT DONATION OF CERTIFICATE

1. If certificate is titled in the **name of the donor**:
 - a. Your signature(s) on the certificate MUST be medallion guaranteed. Please do not fill in any other information on the certificate. The medallion guarantee of your signature can be done at most financial institution (bank branches, brokerages, etc).
 - b. Include a "letter of intent" with your name, address, stock and shares and intent (e.g., donation to Oak City Cares).
 - c. Send by registered mail (or deliver) to Oak City Cares. Send copy of this two-page completed form to Oak City Cares.
 - d. Contact Mike Dawson (919-821-9722 or Michael.dawson@raldioc.org) or Kathy Johnson (984-344-9605 or Kathy.johnson@oakcitycares.org) if you have questions or need assistance.
2. If certificate is titled in the **name of Oak City Cares, Inc.**:

Send by registered mail (or deliver) to Oak City Cares, along with this two-page completed form.

Please send copies of Pages 1 and 2 to:

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Raleigh, NC 27603
Fax: 984-344-9606
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