



## 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](mailto: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  
Hunter Marshall – (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 Amanda Rapant (984) 344-9604 or [development@oakcitycares.org](mailto:development@oakcitycares.org) OR Kathy Johnson (984) 344-9605 or [Kathy.johnson@oakcitycares.org](mailto: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:**

**Oak City Cares, Inc.  
Attn: Kathryn Johnson, Executive Director  
1430 S. Wilmington St.  
Raleigh, NC 27603  
Fax: 984-344-9606  
[Kathy.johnson@oakcitycares.org](mailto:Kathy.johnson@oakcitycares.org)**