

## Stock Donations

Please contact WildEarth Guardians (see below) for separate instructions for transfers made to fund charitable gift annuities, charitable trusts, pooled income fund gifts, or transfers into Guardians' Vanguard account.

### Step #1 CONTACT WILDEARTH GUARDIANS

Please instruct your broker to notify WildEarth Guardians prior to transfer, so that your gift can be handled expeditiously and properly acknowledged for tax purposes.

BY PHONE: Kevin Gaither-Banchoff – (520) 869-4673 BY E-MAIL: [Kevin@wildearthguardians.org](mailto:Kevin@wildearthguardians.org)

### Step #2 INSTRUCT YOUR BROKER TO TRANSFER

See below Step

### #3 TRANSFER THE SHARES (Electronic, Broker In-House, or Via Gift Clearing Account)

Instructions for Electronic (DTC) and Broker In-House Transfers:

Your broker may transfer to WildEarth Guardians' Morgan Stanley Wealth Management account shown below. OR, if your account is with Morgan Stanley Wealth Management, your broker may wish to make a broker in-house transfer into WildEarth Guardians' existing account.

See details below.

For Direct Transfer Code (DTC) or Morgan Stanley Wealth Management In-House:

Morgan Stanley Wealth Management Account #: 217-107546-050

DTC #0015

150 Washington Ave., Suite 301 Santa Fe, New Mexico 87501

Attn: Ben Alaimo-Monson, Financial Advisor

(505) 988-7702 RU (800) 757-3834 (7HOHSKRQH)

FFC WildEarth Guardians

WILDEARTH GUARDIANS Tax ID #: 85-0406306

Instructions for Transfer into a Broker Gift Clearing Account:

Have your broker contact WILDEARTH GUARDIANS about the gift as soon as possible. WILDEARTH GUARDIANS will give your broker instructions as to the disposition of the shares.

Important Notes: If your stock is stock issued in certificate form and held by you, please contact Kevin Gaither-Banchoff at [Kevin@wildearthguardians.org](mailto:Kevin@wildearthguardians.org) or (520) 869-4673.

If your stock is depreciated stock, you can first SELL the shares, then donate the proceeds to WILDEARTH GUARDIANS, claim a gift deduction, AND claim a capital loss deduction to offset any other capital gains you may have.

If your stock is insider or otherwise restricted stock, please contact Kevin Gaither-Banchoff at [Kevin@wildearthguardians.org](mailto:Kevin@wildearthguardians.org) or (520) 869-4673.

*Sample Transfer Instructions Letter for Stock For electronic transfer of un-certificated stock.*

Date

Broker Representative Name

Brokerage Firm Name

Address

City, State, Zip Code

Re: Transfer request Name of Stock Owner/Account Registration Account #:

Dear Broker Representative / To Whom it may concern:

Please accept this letter as authorization to DTC transfer from the shareholdings recorded under account number \_\_\_\_\_ to WildEarth Guardians via WILDEARTH GUARDIANS' brokerage account at Morgan Stanley, a gift of \_\_\_\_\_ shares of the stock of \_\_\_\_\_ (ticker symbol \_\_\_\_\_). Please do not sell or redeem these units, as doing so may result in negative tax consequences.

Before transferring, please first contact Kevin Gaither-Banchoff at WILDEARTH GUARDIANS (520) 869-4673 or kevin@wildearthguardians.org, so that the gift can be expeditiously handled and properly acknowledged for tax purposes. WILDEARTH GUARDIANS' account information for DTC transfer and Tax ID number are below. [If the stock is not traded on an American exchange, please add the following: "As the stock is traded on a foreign exchange, please also contact WILDEARTH GUARDIANS broker representative Ben Alaimo-Monson prior to sending, so that receiving instructions may be set up."]

You may reach Ben Alaimo-Monson at (505) 988-7702 or (800) 757-3834.

Morgan Stanley Wealth Management Account #: 217-107546-050

DTC #0015

150 Washington Ave., Suite 301

Santa Fe, New Mexico 87501

Attn: Ben Alaimo-Monson, Financial Advisor  
(505) 988-7702 or (800) 757-3834 (Telephone)  
FFC WildEarth Guardians

WILDEARTH GUARDIANS Tax ID #: 85-0406306

Sincerely, (Signature Guarantee, if required)

cc: Kevin Gaither-Banchoff, WildEarth Guardians  
516 Alto St., Santa Fe, NM 87501