

securities transfer

(NOTIFICATION)



GIFTING INSTRUCTIONS

Thank you for asking about gifting securities. It is usually beneficial to give appreciated securities as you may bypass any capital gains tax due had you sold them, and you receive a charitable deduction for their fair market value.

Your charitable deduction will be based on the median market value on the date of your gift. The legal gift date for certificates that are mailed is the postmark date on the envelope. For securities wired into our account, the legal gift date is the day they are received in our account.

Wire Transfer of Stock

If the stock certificates are being held in "street name" at your brokerage firm, you may instruct your broker to have them transferred directly to our account at: **DTC Participant #990**

Agent ID #26209

Reference Trust Account #1040199 Heifer Foundation Gift Account

Attn: Thomas Herring

Direct Deposit of Stock

If you have the certificates you may send the certificates along with the required documents to Ardyth Neill, Heifer International Foundation, P.O. Box 727, Little Rock, AR 72203.

Please be sure to send or fax ((501)907-4902) a notification and cost basis form to Ardyth Neill, Heifer International Foundation, P.O. Box 727, Little Rock, AR 72203 when your broker/M&T Bank processes the transfer so we can ensure the securities have been received.

Certificate Transfer

If you have the stock certificates in your possession, take them to a broker or banker to obtain a "MEDALLION GUARANTEE" of your signature(s) on the back of the certificate. Also, please fill in the following information:

- Write "M & T Bank" in the space just in front or above "attorney"
- In the presence of the broker or banker, date and sign at the "X" exactly as your name(s) are on the front of the certificate.
- Have your bank or broker affix the "MEDALLION GUARANTEE"
- Complete a Letter of Authorization to Transfer Assets for each certificate, copies are acceptable. Sign in the presence of a Notary Public and have them affix the seal.
- Mail the certificates and accompanying forms via REGISTERED mail to Heifer International Foundation, P.O. Box 727 Little Rock, AR 72203.

Transfer to Heifer International Foundation for:

Country Endowment

Annuity

Trust

Endowment

Cost Basis: \$ _____



Stock Gift: _____ shares of _____

Authorized by: _____

Address _____

City _____ State _____ Zip _____

Phone _____

Please return this form to:

Heifer Foundation

P.O. Box 727, Little Rock, AR 72203

Tel: (888) 422-1161, Fax: (501) 907-4902

e-mail: info@heiferfoundation.org

www.heiferfoundation.org