

Jamestown-Yorktown Foundation, Inc.

P.O. Box 3605, Williamsburg, Virginia 23187-3605
(757) 253-4139 (757) 253-5299 Fax (757) 253-5110 TDD www.historyisfun.org



A 501(c)(3) organization
in support of the
Jamestown-Yorktown Foundation
and its accredited museums
Tax I.D. 31-1618642

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INSTRUCTIONS FOR TRANSFER OF SECURITIES VIA DEPOSITORY TRUST COMPANY (DTC)

To ensure a smooth transfer of the stock you are contributing, please take the following steps:

1. Notify your bank or broker that you would like to transfer shares as a charitable gift to the **Jamestown Yorktown Foundation, Inc.** Tax ID number 31-1618642. Identify the number of shares and type of shares you would like to contribute. (Your bank or broker may require instructions in writing with a signature guarantee.)
2. We have several accounts available to facilitate acceptance of your gift. Please select one and provide your broker exact transfer instructions noted below:

Wells Fargo Advisors DTC #0141
The Optimal Service Group of Wells Fargo Advisors
428 McLaws Circle, Suite 100, Williamsburg, VA 23185-5646
Account Name: Jamestown-Yorktown Foundation, Inc.
Reference Account Number: 4579-9237
Attention: Christine Stiles (757) 220-1782
christine.stiles@wellsfargoadvisors.com
From: *Your name and account number**

Davenport & Company, LLC DTC #0715
One James Center, 901 E Cary St, Richmond VA 23219
Account Name: Jamestown-Yorktown Foundation, Inc.
Reference Account Number: 4554-5698
Broker Assigned to JYF, Inc. account: Mary Davis
Attention: Ms. Caitlin Gillie (804) 698-2683 (fax # 804-549-4683)
cgillie@investdavenport.com
From: *Your name and account number**

MorganStanley SmithBarney DTC #0015
The Spencer Group, 701 Town Center Dr, Ste 902, Newport News VA 23606
Account Name: Jamestown-Yorktown Foundation, Inc.
Reference Account Number: 670-105454
Attention: Ms. Ryann J. MacLuskie (757) 873-3300
ryann.j.macluskie@morganstanleysmithbarney.com
From: *Your name and account number**

* **IMPORTANT** – Your broker must include your **name** and account number when stock is transferred to the Jamestown-Yorktown Foundation, Inc. via DTC. Without that information, we have no way to identify and acknowledge your gift.

3. Please notify us when you initiate transfer of your stock gift so that we can assure proper receipt of your contribution (please include which broker you selected).
E-mail: giving@jyf.virginia.gov Phone: (757) 253-4139 Fax: (757) 253-5299
Jamestown-Yorktown Foundation, Inc., Attn: Development Office-Gift Processing Team, PO Box 3605, Williamsburg, VA 23187

Thank you very much for your contribution to the Jamestown-Yorktown Foundation, Inc.

Updated 10/23/2019

educating • interpreting • preserving • commemorating

TRANSFER INSTRUCTIONS FOR STOCK HELD IN CERTIFICATE FORM

To ensure a smooth transfer of the stock you are contributing, please notify the Jamestown-Yorktown Foundation, Inc. of your stock gift and take the following steps:

1. In one envelope, please send the *unendorsed* certificates (do not sign or otherwise endorse the certificates) by first-class mail to:

Development Office
Attn: Gift Processing Team
Jamestown-Yorktown Foundation, Inc.
Post Office Box 3605
Williamsburg, VA 23187-3605

2. With the certificates, please include a **cover letter** stating your intention to make a gift of the stock to the Jamestown-Yorktown Foundation, Inc. All owners listed on the certificates must sign the gift letter exactly as their names are shown on the certificates.

If you wish to split a certificate and give the Jamestown-Yorktown Foundation, Inc. only a portion of the certificate's shares, please specify that in your cover letter and the Jamestown-Yorktown Foundation will have a new certificate for the remaining shares reissued to you.

3. In a **separate** envelope, mail to the address above sufficient **stock powers** to complete the gift (one stock power for each certificate). The stock powers should be left blank and must be signed by the owners listed on the stock certificate *exactly* as shown on the certificate. Finally, the signatures on the stock powers must have a signature guarantee from a bank or stockbroker.

**Thank you very much for your generous support of the
Jamestown-Yorktown Foundation, Inc.**