



## Instructions for Stock Share Donations

Thank you for supporting the Taubman Museum of Art.

The easiest way to provide a gift of stock to the Taubman Museum of Art is through electronic wire transfer from your brokerage account to the museum brokerage account.

To assist with your stock transfer donation please complete the following forms:

1. Initiate the Stock Transfer: Contact your broker and provide the completed Electronic Transfer Authorization Form
2. Contact the Taubman Museum of Art and provide the Stock Donation Notification form

Should you not have access to the forms mentioned above please contact:

Lloyd, Pettit and Associates or  
Merrill Lynch Financial  
114 Market Street  
Roanoke, VA 24011  
540-985-5412

The Taubman Museum of Art  
110 Salem Ave Se  
Roanoke, VA 24011  
540-342-5760 or 540-204-4135

So that we may properly recognize your gift please include your name, contact information, and special instructions for the transfer.



**Electronic Transfer Authorization Form – Stock Donations**

Please transfer the listed securities to The Taubman Museum of Art using the account information referenced here:

Lloyd, Pettit and Associates DTC# 5198  
Merrill Lynch Financial Account # 71502307  
114 Market Street  
Roanoke, VA 24011  
540-985-5412

**Donor Information:**

Donor Name: \_\_\_\_\_ Phone No.: \_\_\_\_\_  
Donor Address: \_\_\_\_\_  
Special Instructions: \_\_\_\_\_

**Stock Transfer Information:**

Donor Broker Contact Information: \_\_\_\_\_  
Name of Security: \_\_\_\_\_  
Number of Shares: \_\_\_\_\_

Signed (Donor): \_\_\_\_\_ Date: \_\_\_\_\_

Signed (Joint Owner): \_\_\_\_\_ Date: \_\_\_\_\_

Thank you for supporting the Taubman Museum of Art.



**Stock Donation Notification Form**

I/We intend to give the following stock to the Taubman Museum of Art as a charitable contribution.

Donor Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_  
Address: \_\_\_\_\_

Date Donation was made: \_\_\_\_\_

Donor Brokerage Name: \_\_\_\_\_  
Contact Information: \_\_\_\_\_

Name of Stock: \_\_\_\_\_ No of Shares: \_\_\_\_\_  
Special Instructions: \_\_\_\_\_

Please send further information regarding:  
\_\_\_\_ Contributing to the Endowment Fund  
\_\_\_\_ Membership/Membership Benefits  
\_\_\_\_ Legacy Giving

**Return the form to:**

The Taubman Museum of Art  
110 Salem Ave SE  
Roanoke, VA 24011