



## **Instructions for Stock Share Donations**

Thank you for supporting the Taubman Museum of Art. The museum is registered by the Internal Revenue Service as a 501(c) (3) non-profit organization, tax ID 54-6026841.

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:

The Lloyd-Pettit Group  
Merrill Lynch  
110 Franklin Road SE  
Roanoke, VA 24011  
540-985-5405  
Jessica Miller  
[jmiller45@ml.com](mailto:jmiller45@ml.com)

or Taubman Museum of Art  
110 Salem Avenue SE  
Roanoke, VA 24011  
540-204-4132 or 540-769-9630  
Amy Milberger  
[amilberger@taubmanmuseum.org](mailto:amilberger@taubmanmuseum.org)

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:

**Call the following for Account Information**

**The Lloyd-Pettit Group**  
Merrill Lynch  
110 Franklin Road, SE  
Roanoke, VA 24011  
**540-985-5405**

DTC No: 8862  
Account No: 71502306

**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:

- \_\_\_\_\_ Annual Fund/Programs and Services
- \_\_\_\_\_ Membership
- \_\_\_\_\_ Endowment Fund

**Return the form to:**

**Taubman Museum of Art**  
**110 Salem Ave SE**  
**Roanoke, VA 24011**  
**e. [amilberger@taubmanmuseum.org](mailto:amilberger@taubmanmuseum.org)**  
**f. 540.342.5798**  
**c/o Amy Milberger, Deputy Director of Development**