



Gifts of Stock Procedures Form

Thank you for your interest in making a gift of stock to the Rockford Symphony Orchestra.

Please complete this form to execute your transfer and submit a copy of this completed form to your broker. The RSO is not authorized to execute the transfer of stock on your behalf.

Donor Name: _____

Transaction Date: ____/____/____

Financial Advisor Name: _____

Financial Advisor Phone #: _____

Stock Name: _____ # Shares: _____ Approx. Value: _____

Donor Signature

Date

Phone Number

Please provide your financial advisor with the following information for the RSO's account with Merrill Lynch. The RSO will use the average of the high and low price of the stock on the day the shares are received in the RSO's account to value the gift. Please consult your tax advisor for the amount of your charitable deduction.

Account: Merrill Lynch

Account #: 63304184

Representative: Maria Dietz

DTC#: 5198

Address: 6958 Spring Creek Rd.
Rockford, IL 61114

RSO Tax ID: 36-6109375

Phone #: 815.394.5661

When you have instructed the transfer of stock, please contact Julie Thomas, Executive Director, so that we may confirm receipt of your gift and provide a timely acknowledgement letter.

Julie Thomas, Executive Director
815.972.2938 (phone)
jthomas@rockfordsymphony.com