



Request stock brokerage details

Each stock gift we handle strengthens our programmatic work while providing tax benefits for supporters. To request our financial information for gifting stock, please fill out your contact information and the details of your intended gift in the form below. Please note that the gift details you provide here are nonbinding and are used only to help verify gifts received and provide you with a proper tax acknowledgement letter.

What is the name of your financial brokerage? _____

Securities to Transfer _____

Please only list securities that are held in the brokerage you specified in the preceding question. If you would like to transfer securities from multiple brokerages, please fill out a separate form for each brokerage.

When will you make your transfer? _____

If you are not sure when you intend on completing your transfer, please provide your closest date approximation. This helps us correctly locate and verify your gift so that we can provide you with a tax acknowledgement letter.

Month _____ Day _____ Year _____

Full legal name _____

Please provide your name as it appears on your tax returns and other official documentation.

Your E-mail: _____

Phone Number(s): _____

Where should we mail your tax acknowledgement letter?

Address: _____

City: _____ State: _____ Zip: _____

Your signature: _____

Date: _____

Please return this form to Kim Loftus to receive the information on how to transfer the gifts of stock and to be certain that you receive the credit for the gift, please contact Kim Loftus at (800) 692-1828 or history@hsmichigan.org.

Historical Society of Michigan, Development Office, 7435 Westshire Drive, Lansing, MI 48917

EIN TAX ID: 38-1452689