



DONATION OF SECURITIES

Thank you for your donation of securities to Heritage Foundation of Williamson County. Please mail or email this completed form to:

Susan Earl Hosbach, CFRE, FAFP
Chief Development Officer
Heritage Foundation of Williamson County
P.O. Box 723
Franklin, TN 37064

Phone: (615) 591-8500 Email: shosbach@williamsonheritage.org

Please fill out the information below. This information will assure that an appropriate receipt is issued in a timely manner and that you receive an acknowledgement for tax purposes.*

Name and Type of Securities (e.g., IBM stock) # of Shares Date of Transfer

Purpose of Donation (e.g., general support, Franklin Grove Estate & Gardens, etc.)

Donor's Name

Broker's Name

Donor's Street Address

Broker's Company

Donor's City / State / Zip

Broker's Telephone Number

Donor's Telephone Number (only used if a question or problem arises in the donation process)

The following information will assist you and your broker in this process. Heritage Foundation's broker contact information is:

Rachel Pena, B. Riley Wealth
3000 Meridian Blvd Ste 180
Franklin, TN 37067
(615) 567-2084

Heritage Foundation's account number is #7456-2285. For electronic transfers, our DTC number is #0141, directing the stock gift to Heritage Foundation of Williamson County. We are a nonprofit Tennessee corporation qualified under section 501(c)(3) of the Internal Revenue Code. Heritage Foundation's tax identification number (EIN) is 23-7042596.

*After Heritage Foundation receives this form and our broker confirms donation of the securities, the Development Department will issue an official acknowledgement letter to the donor. This letter will indicate the number and type of shares received and the date the stock was converted into a gift (day when ownership of stock was transferred to Heritage Foundation or the stock was unconditionally delivered to Heritage Foundation). All contributions are tax deductible to the fullest extent provided by law. Please contact your tax advisor for complete tax deductibility rules.