



## Transferring Stocks and Securities

Gifts of stocks and securities can be a beneficial way to contribute to Durham Habitat, because capital gains taxes may be avoided if the gain is used to make a charitable gift. The value of the gift is established as the fair market value of the stock on the date of transfer.

**To best facilitate the transfer and acknowledgment of your stock gift, please notify us of your name, the name of the stock, and the number of shares you are donating before you transfer the stocks.** Contact Jill Wright via [email](#) or at 919.682.0516 x 109 to share your plans. Your broker can easily facilitate the transfer to Durham Habitat by using the following information:

### **Electronic Transfers**

Edward Jones Investments

919.401.5277

(fax) 877.786.2799

DTC #: 0057

FBO (for benefit of): Habitat for Humanity of Durham

Edward Jones account number: 223-06962-1-9

### **Certificate Transfers**

Please mail or deliver the certificate with a cover letter to:

Edward Jones Investments

6340 Quadrangle Dr., Suite 90

Chapel Hill, NC 27517

For questions about electronic or certificate transfers, contact:

Patrice Hewlett

Branch Office Administrator

Edward Jones

(919) 401-5277

[patrice.hewlett@edwardjones.com](mailto:patrice.hewlett@edwardjones.com)