



## SENIOR PET ADOPTIONS

### *Instructions for Electronic Transfer of Stock to Young at Heart Pet Rescue, Inc.*

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- Young at Heart Pet Rescue's account is with **Fidelity Investments**
- For assistance, please contact **1-800-FIDELITY (800-343-3548)**
- Our Fidelity account number is **Z50397148**
- Our DTC number is: **0226** (used when stock transferred from donor's account to our account)
- Our Tax ID# is: **20-2476194**
- When you authorize the stock transfer you will need to provide the following information:
  - Name of registered owners of the shares
  - Name of eligible brokerage
  - Account holder address and daytime telephone number
  - Whether you will list your name or remain anonymous
  - If your account is with Fidelity and the donation is for less than \$10,000, no signature guarantee will be required. If the donation is greater than \$10,000, a signature guarantee may be required
- **If you have not already informed us of your gift, please write, fax or call Young at Heart Pet Rescue to do so** (contact information listed below). Donor names may not transfer with the shares. You may fax us a copy of the request letter you send to your broker. To ensure your gift is used to support the area you wish, we need confirmation of the number and kind of shares you have given, as well as the designation.
- The value of gifts of securities received by Young at Heart Pet Rescue is determined as follows:  
Donation of stock - Electronic Transfer: The receipted amount will be calculated based upon the average of the high and low stock price on the date that transfer is confirmed by our custodian.  
Donation of stock- Physical Transfer - The receipted amount will be calculated based upon the average of the high and low stock price on the date Young at Heart Pet Rescue is in physical possession of the shares. The securities will be immediately liquidated and the activity funded will be credited with the net proceeds from the sale, including any gain or loss.  
Please consult your attorney and/or tax advisor regarding the special regulations and requirements related to stock and other non-cash gifts.
- For more information about gifting stock, please contact:

815.333.4001

[donate@adoptaseniorpet.com](mailto:donate@adoptaseniorpet.com)

**Thank you for your gift!**

# Young at Heart

## SENIOR PET ADOPTIONS

### Notification of Stock Transfer Form

Please complete the following form and fax or mail in advance of your stock transfer to Young at Heart Pet Rescue at Fidelity Investments. Contact information is listed at bottom of form.

Donor names may not transfer along with stock shares so it is important for you to notify us in advance. To ensure your gift is used to support the area you wish, we need confirmation of the type and number of shares you are gifting, as well as the designation.

Donor Name(s)	
Address	
City, State Zip	
Phone / Email	

☐ I plan to transfer stock electronically from my account to Young at Heart Pet Rescue's account at Fidelity Investments, per below:

#### Young at Heart Pet Rescue

Account #: **Z50397148**

DTC #: **0226**

Tax ID #: **20-2476194**

**My Brokerage Firm/Transfer Agent:** \_\_\_\_\_

**Account #:** \_\_\_\_\_

**Broker Name:** \_\_\_\_\_

**Broker Contact Information: (Tel/Fax)** \_\_\_\_\_

#### NAME OF STOCK(S) & NUMBER OF SHARES (must complete)

1. \_\_\_\_\_ (Name/# of shares)

2. \_\_\_\_\_ (Name/# of shares)

**Estimated Date of Transfer:** \_\_\_\_\_

**Designation of Gift:** \_\_\_\_\_

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Mail to: Young at Heart  
 4301 S IL Route 47, Woodstock IL 60098  
 815-333-4001 • donate@adoptaseniorpet.com