



## Sharing your Shares with Others!

A gift of stock or securities is a wonderful way to share your compassionate support. Everything you need to donate stock or securities is right here and can be completed in as little as two easy steps. If you have questions or would like our assistance in the process, please feel free to contact us. ***Please note: if you would like to transfer mutual funds, please contact our Enterprise Accounting team in advance as additional instructions may be required: 501-907-2848.***

## Gift Valuation

Your generous charitable gift to Heifer will be valued at the median market price on the date of the gift, which is determined by the method of delivery.

- The legal gift date for securities electronically transferred is the day they are received in our account.
- The legal gift date for certificates that are mailed is the postmark date on the envelope.

**In keeping with IRS regulation and Heifer Policy, Heifer International can only accept donations of commonly held, publicly traded stocks.**

## Gifts by Electronic Transfer

The easiest way for you to gift stock or securities to Heifer International is through an electronic transfer (DTC) from your brokerage account to Heifer's account. Please remind your broker(age) to include all of the information including your name, contact information and special instructions for the transfer. This information is essential for timely acknowledgement. When stocks are transferred electronically, we are informed only of the stock name and the number of shares, not the name of the donor, unless you authorize your broker to share this information with us. *Failure to share your gift intent with us may delay the gift acknowledgement for tax reporting purposes.*

### Two Easy Steps:

1. Complete the attached Stock Gift Notification form and return to us email or snail mail.
2. Complete the Electronic Transfer Authorization Form and provide it to your broker. This will provide your broker with all the information they need to complete a transfer on your behalf.



## Certificate Transfer

If you hold stocks or securities in certificate form, please mail your unendorsed paper certificates to our Broker, noted below with a Stock Power Form. **A signed stock certificate is legal tender.**

### Four Easy Steps:

1. Complete the attached Stock Gift Notification form and return to us via email or snail mail.
2. Print a Blank Stock Power Form for each certificate.
3. Take the Blank Stock Power Form(s) to your bank to have your signature Medallion Signature Guaranteed.
  - Please do not sign the Stock Power Form(s) until you are in front of the bank staff who will guarantee your signature.
  - You will need one form of picture identification.
  - Signatures need to be signed as they appear on the certificate. Apart from your signature, please do not complete any additional information on the form.
4. For security purposes, send the documents in two separate envelopes to Heifer International's Broker as noted below: *(via USPS Registered Mail with Return Receipt Requested)*
  - Send the signature guaranteed Stock Power Form(s) in one envelope
  - Send the **UNSIGNED** stock certificate(s) in a second envelope to Heifer International's broker at:

**Merrill Lynch**  
**Attn: Jayna Peterson**  
**2200 N Rodney Parham Rd, Suite 300**  
**Little Rock, AR 72212**

## Contact

***Please note: if you would like to transfer mutual funds, please contact our Enterprise Accounting team in advance as additional instructions may be required: 501-907-2848***

Heifer International	Broker for Heifer International
ATTN: Enterprise Accounting	Merrill Lynch
1 World Ave	Attn: Jayna Peterson
Little Rock AR 72202	2200 N Rodney Parham Rd Ste 300
<a href="mailto:stock-gifts@heifer.org">Email: stock-gifts@heifer.org</a>	Little Rock AR 72212
Phone: 501-907-2848	Phone: 501-312-7200



Thank you for caring and investing in Heifer International and the families we serve. Generous individuals like you are the foundation of our work— it is the means through which Heifer’s mission is fulfilled, lives are transformed and families around the world begin new lives of hope and opportunity.

Heifer International can only accept donations of commonly held, publicly traded stocks. Heifer International is qualified as a charitable organization under Section 501(c)(3) of the Internal Revenue Code. Contributions to Heifer International are tax-deductible to the extent permitted by law.

The material presented here is not offered as legal or tax advice. Please seek the counsel of your tax advisor, attorney and/or financial planner to review tax calculations to ensure that a contemplated gift is appropriate for your situation.

View our [Charitable Solicitation Disclosure Statements \(PDF\)](#)



### Notification of Transfer

I (We) are donating \_\_\_\_\_ shares of \_\_\_\_\_  
Common stock to be used as follows:

- General Fund – Where Needed Most
- Special Project \_\_\_\_\_

### Brokerage Information:

Broker's Name \_\_\_\_\_

Brokerage \_\_\_\_\_

Telephone/Email \_\_\_\_\_

### Donor Information:

*By providing Donor Information, you are enabling Heifer International to provide you with a timely acknowledgement of your gift for tax purposes.*

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

Donor wishes to remain anonymous?  Yes

*By checking this box, you will receive an acknowledgement of your gift but your donation will be reported as an anonymous gift.*

If the securities are being held in the "street name" at your brokerage firm, you may instruct your broker to have them wire transferred to us, in care of our broker, Merrill Lynch, using the Electronic Transfer Authorization Form provided.

**Please return this completed form to:**

**Heifer International  
ATTN: Enterprise Accounting  
1 World Ave  
Little Rock, AR 72202  
Phone Number: 501-907-2848  
Email: Stock-Gifts@heifer.org**

*Heifer International is qualified as a charitable organization under Section 501(c)(3) of the Internal Revenue Code. Contributions to Heifer International are tax-deductible to the extent permitted by law.*



**Electronic Transfer Authorization Form**

Please transfer the listed securities from my account to Heifer Project International’s account with Merrill Lynch using the following information:

**Merrill Lynch**  
**For Further Credit to: Heifer Project International**  
**Tax ID #35-1019477**  
**DTC #8862**  
**Account #563-03155**

**Please note: if this is a mutual fund transfer, please contact Enterprise Accounting beforehand to confirm the fund type. Additional instructions may be required: 501-907-2848**

**Brokerage Information:**

Broker’s Name \_\_\_\_\_  
Brokerage \_\_\_\_\_

**Personal Information:**

Account # \_\_\_\_\_  
Title \_\_\_\_\_ Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_  
State \_\_\_\_\_ Zip Code \_\_\_\_\_ Country \_\_\_\_\_

I hereby release my name and contact information so that I may receive a receipt from Heifer Project International.

*If you choose **not** to release your name and contact information, HPI may not be able to provide you with a receipt of your gift.*

**Securities Information**

Name of Security	Number of Shares/ Bond Face Value
_____	_____
_____	_____
_____	_____

Signed (Donor) \_\_\_\_\_ Date \_\_\_\_\_  
Signed (Donor, joint-owner) \_\_\_\_\_ Date \_\_\_\_\_



### Irrevocable Stock or Bond Power

For value received, the undersigned does (do) hereby sell, assign, and transfer to

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Social Security or Taxpayer ID number:

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#### If stocks, complete this portion:

\_\_\_\_\_ Shares common stock of \_\_\_\_\_  
Represented by certificate(s) No.(s) \_\_\_\_\_ inclusive,  
standing in the name of the undersigned on the books of said Company.

#### If bonds, complete this portion:

\_\_\_\_\_ Bonds of \_\_\_\_\_ in the  
principal amount of \$ \_\_\_\_\_, No.(s) \_\_\_\_\_  
inclusive, standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint

\_\_\_\_\_  
attorney to transfer the said stock or bond(s), as the case may be, on the books of said  
Company, with the full power of substitution in the premises.

#### IMPORTANT:

The signature(s) to this power must correspond with the name(s) as written upon the face of the  
certificate(s) in every particular without alteration.

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\_\_\_\_\_  
[person(s) executing this power sign(s) here]

\_\_\_\_\_  
[Date]

**Please note:**

- **Apart from your signature, please do not complete any information on the stock power form.**
- **Your signature on the stock power form must be medallion guaranteed.**
- **It is very important that your certificate & your stock power form be sent in separate envelopes.**