



Gifts of Securities to Eugene Ballet

Gifts of Securities can provide you with valuable tax benefits while allowing you to support Eugene Ballet with charitable contributions. Shares can be transferred electronically by your broker. Notify your broker that you wish to make a gift of securities to Eugene Ballet. Your broker may need written authorization from you including the name of stock and number of shares before the transfer can be made. Notify Eugene Ballet to expect the transfer including the name of stock(s) and number of shares, as your name may not remain attached to the securities transfer. Notifying Eugene Ballet of an impending securities will avoid delays in receipt, sales, and recording of your gift. Security transfer instructions may change, so it is important to verify Eugene Ballet's current information prior to each gift.

Charles Schwab

Charles Schwab & Co., Inc.,
Attn: Transfer of Accounts
P.O. Box 52013
Phoenix, AZ 85072

Account # 1465-2041 (Eugene Ballet Company)

Overnight Mailing Address:
Charles Schwab & Co., Inc.
Attn: Cashiering
3133 East Camelback Road,
Phoenix, AZ 85016

ACAT Mutual Fund Registration Instructions :

All deliveries **MUST** include client name and Schwab account number.

American Funds

American Funds Service Company
PO Box 6164
Indianapolis, IN 46206-6164
Account # 4003182720 (Eugene Ballet Company)

Overnight Mailing Address:
12711 N. Meridian St
Carmel, IN 46032-9181

Please complete the information on this back of this form in advance of your security transfer and email to Meagan Thibodeaux at Eugene Ballet at meagan@eugeneballet.org. This will enable Eugene Ballet to track your transaction, ensure that your gift account is credited properly, and promptly issue a charitable receipt for your records.



Gifts of Securities to Eugene Ballet

Name of Donor

Purpose of Gift (Annual Fund, Gala Table, etc)

Home Address, City, State, Zip

Phone Number

Donor's Clearing Broker Company

Contact Name

1. Name of Security and Ticker Symbol and Number of Shares

2. Name of Security and Ticker Symbol and Number of Shares

3. Name of Security and Ticker Symbol and Number of Shares

Donor Signature

Date