



Charlottesville-Albemarle SPCA (CASPCA)
3355 Berkmar Drive | P.O. Box 7047
Charlottesville, VA 22901

P: 434.973.5959 | F: 434.973.5271

Stock Gift – Sample Letter

Thank you for making a gift of stock to the Charlottesville-Albemarle SPCA! Please send the following sample letter to your broker.

Date:

Dear (donor's broker):

I/we wish to donate (number) shares of (name of shares) stock/mutual fund held in my/our (name of brokerage) account, # (account number) to the Charlottesville-Albemarle SPCA (Tax ID # 54-0595009).

Please transfer (number) shares to the CASPCA's brokerage account as follows:

Charles Schwab & Co., Inc
DTC Participant Number: 0164, Code 40
Account Name: Charlottesville Albemarle
SPCA Account Number #: 9138-8351
Attention: Transfers, 800-435-1000

Our Charles Schwab & Co., Inc contact in charge of transactions is:

Elizabeth P. Morris
Morris & Wells Wealth Management
230 Court Square
Charlottesville, VA 22902
epmorris@morrisandwells.com

This donation represents my gift to the Charlottesville-Albemarle SPCA. It is imperative that you forward my name with the stock transfer to the CASPCA for gift verification purposes. If you have any questions about this donation, please call me at (donor's phone number).

Sincerely,
(Donor's signature)

Cc:
Development Department
Charlottesville-Albemarle SPCA
3355 Berkmar Dr; Charlottesville, VA 22901
434-973-5959; development@caspca.org