

Sample Letter

Dear:

I would like to make a gift of stock on [insert date] to [name of charity]. Please transfer [number] shares of [company name] to the charity in [indicate month, year when you would like transfer to occur].

It is important to contact at [name of charity], as he/she will advise you to the proper account to which this should be transferred. He/she can be reached at _____. The charity will also provide me with a receipt for this gift.

Thank you for your prompt attention to this matter.

Sincerely,

cc: [name of charity]