

Gifts of stock? Yes, it's an option!

Questions? Contact Mondy Lamb, Director of Development at:
mlamb@spcawake.org or 919.532.2086



Instructions for donating gifts of stock to the SPCA of Wake County:

Donating appreciated stocks, bonds or mutual funds to the SPCA of Wake County is quick and easy! We work closely with First Citizens Bank to receive and sell your transferred securities. We then put the proceeds of the sale to work saving animals and issue you a letter that serves as a receipt of your tax-deductible gift. *Please let the SPCA know of your intent to transfer stock so we will be able to properly acknowledge and honor your gift – see contact information above.*

Benefits: You receive gift credit and an immediate income tax deduction for the fair market value of the securities on the date of transfer, no matter what you originally paid for them. Plus you pay no capital gains tax on the securities you donate to the SPCA of Wake County.

DELIVERY INSTRUCTIONS FOR STOCK GIFTS

To gift shares of stock currently held in a brokerage account, please provide the following delivery instructions to your broker:

DTC PARTICIPANT NO:	901
INTERNAL ACCT. NO	091957/FIRST CITIZENS BANK
INSTITUTIONAL ID NO.	28547
SDFS:	Your instructions should state "SDFS". Please ensure that the broker code is the party actually clearing your trade
AGENT BANK ID NUMBER:	80901
ACCOUNT NAME:	SPCA of Wake County

Please have your banker provide information to Brandon Whitley via fax to 919.716.2025 or email to Brandon.Whitley@firstcitizens.com letting him know the gift has been initiated and providing your name as the donor.

To gift stock held in physical form, please endorse the certificate and mail it to:

R. Brandon Whitley, CFP®, CTFA
First Citizens Bank & Trust Company
4300 Six Forks Road – FCC61 | Raleigh, NC 27609

Enclose a letter documenting your wishes to contribute the stock to the SPCA of Wake County. Please note that an endorsed stock certificate is a negotiable item. As such, you may wish to send the package via certified or registered mail in order to track its delivery. If you have questions about stock transfer steps contact Brandon Whitley at 919.716.2015.

The SPCA of Wake County, Inc is a 501(c)(3) nonprofit corporation. Federal Tax ID#: 56-0891732

Main office location: SPCA Pet Adoption Center | 200 Petfinder Lane | Raleigh, NC 27603

Financial information about this organization and a copy of its license are available from the State Solicitation Licensing Branch at 1-888-830-4989. The license is not an endorsement by the State.