



## **INSTRUCTIONS FOR TRANSFERRING APPRECIATED SECURITIES**

Making gifts of appreciated securities need not be complicated. When giving securities be sure to consult with your financial advisors and/or attorney. Additional time should be allowed for completion of such gift transactions.

**TRANSFER INSTRUCTIONS FOR STOCK HELD WITH A BROKER (Securities held by your broker)**

1. Call the Texas Veterinary Medical Foundation office to notify us of your gift.
2. Instruct your broker in writing to transfer the stock directly to TVMF's brokerage account (call TVMF for account details).
3. Confirm your gift with a letter to the Texas Veterinary Medical Foundation Office describing the securities and specifying how the Texas Veterinary Medical Foundation should use your gift. It is the policy of the Texas Veterinary Medical Foundation that if no instructions on how your gift should be used, TVMF will liquidate the gift and invest in our brokerage account.

**INSTRUCTIONS FOR STOCK HELD IN CERTIFICATE FORM (Certificates you hold)**

1. Call the Texas Veterinary Medical Foundation office to notify us of your gift.
2. Mail the unendorsed certificate, along with a letter of instruction, to the Texas Veterinary Medical Foundation Office.
3. In a separate envelope, mail a stock power (signed and dated) for each certificate to: Texas Veterinary Medical Foundation, 8104 Exchange Drive, Austin, TX 78754.

Please contact the Texas Veterinary Medical Foundation office at 512-452-4224 or by email at [Ltlibbitts@tvma.org](mailto:Ltlibbitts@tvma.org) for the Texas Veterinary Medical Foundation Brokerage Account Information.

As with any decision involving your estate plans, we urge you to seek the advice of professional counsel when considering a gift to the Texas Veterinary Medical Foundation.

*The Texas Veterinary Medical Foundation's Tax ID is 74-1983485.*