

# Jamestown-Yorktown Foundation, Inc.

P.O. Box 3605, Williamsburg, Virginia 23187-3605

(757) 253-4139 (757) 253-5299 Fax (757) 253-5110 TDD [jyfmuseums.org](http://jyfmuseums.org)



## INSTRUCTIONS FOR TRANSFER OF SECURITIES VIA DEPOSITORY TRUST COMPANY (DTC)

To ensure a smooth transfer of the stock you are contributing, please take the following steps:

1. Notify your bank or broker that you would like to transfer shares as a charitable gift to the **Jamestown Yorktown Foundation, Inc.** Tax ID number 31-1618642. Identify the number of shares and type of shares you would like to contribute. (Your bank or broker may require instructions in writing with a signature guarantee.)
2. We work with The Optimal Service Group of Wells Fargo Advisors to facilitate acceptance of your gift. Please provide your broker exact transfer instructions noted below:

**Wells Fargo Advisors DTC #0141**  
**The Optimal Service Group of Wells Fargo Advisors**  
**428 McLaws Circle, Suite 100, Williamsburg, VA 23185-5646**  
Account Name: Jamestown-Yorktown Foundation, Inc.  
Reference Account Number: 4579-9237  
Attention: Ms. Emily Sporrer (757) 220-1782  
[emily.e.sporrer@wellsfargo.com](mailto:emily.e.sporrer@wellsfargo.com)  
From: *Your name and account number\**

*\* IMPORTANT – Your broker must include your **name** and account number when stock is transferred to the Jamestown-Yorktown Foundation, Inc. via DTC. Without that information, we have no way to identify and acknowledge your gift.*

3. Please notify us when you initiate transfer of your stock gift so that we can assure proper receipt of your contribution (please include which broker you selected).  
**Jamestown-Yorktown Foundation, Inc. • Attn: Development Office**  
**PO Box 3605 • Williamsburg, VA 23187**  
**E-mail: [giving@jyf.virginia.gov](mailto:giving@jyf.virginia.gov) • Phone: (757) 253-4139 • Fax: (757) 253-5299**

**Thank you very much for your contribution to the Jamestown-Yorktown Foundation, Inc.**

A 501(c)(3) organization  
in support of the  
Jamestown-Yorktown Foundation  
and its accredited museums  
Tax I.D. 31-1618642

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Christy S. Coleman  
*Executive Director*

## TRANSFER INSTRUCTIONS FOR STOCK HELD IN CERTIFICATE FORM

To ensure a smooth transfer of the stock you are contributing, please notify the Jamestown-Yorktown Foundation, Inc. of your stock gift and take the following steps:

1. In one envelope, please send the **unendorsed** certificates (do not sign or otherwise endorse the certificates) by first-class mail to:

Jamestown-Yorktown Foundation, Inc.  
Attn: Development Office  
PO Box 3605  
Williamsburg, VA 23187-3605

2. With the certificates, please include a **cover letter** stating your intention to make a gift of the stock to the Jamestown-Yorktown Foundation, Inc. All owners listed on the certificates must sign the gift letter exactly as their names are shown on the certificates.

If you wish to split a certificate and give the Jamestown-Yorktown Foundation, Inc. only a portion of the certificate's shares, please specify that in your cover letter and the Jamestown-Yorktown Foundation will have a new certificate for the remaining shares reissued to you.

3. In a **separate** envelope, mail to the address above sufficient **stock powers** to complete the gift (one stock power for each certificate). The stock powers should be left blank and must be signed by the owners listed on the stock certificate *exactly* as shown on the certificate. Finally, the signatures on the stock powers must have a signature guarantee from a bank or stockbroker.

**Thank you very much for your generous support of the  
Jamestown-Yorktown Foundation, Inc.**