



Preservation North Carolina

PROCEDURE FOR STOCK GIFTS

Stock gifts should be transferred electronically from your broker to our broker, via the two-step process below:

1. Give your bank or broker the following instructions:

Truist Investment Services

DTC# 0226

Account# WA8091207

Account name: The Historic Preservation Foundation of North Carolina, Inc.

Truist Investments Contact: 1-888-516-5247, option 1

2. Have your broker email the donation transfer details to sphillips@presnc.org, alerting us to expect your gift and initiate the sale of stock on our end. Please include the following information in your email:

- Donor name and address
- Name and/or ticker symbol of the security
- Number of shares

Step 2 is critical so that we know when to confirm the sale of shares with our broker and ensures we can properly credit the donation to you and acknowledge the gift accordingly. (Our transaction reports don't list donor names, so we need to know who donated which shares.)

If you have any questions, please contact Shannon Phillips, Director of Development, at sphillips@presnc.org (fastest) or 919-832-3652 ext. 229.

Thank you for your generous support for Preservation North Carolina!

www.PreservationNC.org

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Nonprofit Tax ID: 56-1145386