



STOCK GIFT TRANSFER Information and Instructions

1. To transfer securities held by a broker, send a Letter of Instruction requesting transfer of securities to the Preserve account. The Letter of Instruction should include: **name of the stock, number of shares, and approximate date of transfer to the benefit of Mohonk Preserve.**

One copy of the Letter of Instruction should be sent or emailed to:

Development Department
Mohonk Preserve, Inc.
PO Box 715
New Paltz, NY 12561-0715
Email: development@mohonkpreserve.org

Another copy should be sent or faxed to:

M & T Financial Services
Attn: ISG Team/Patty Wallaitis
285 Delaware Avenue Ste. 100
Buffalo, NY 14202
Fax: 716-651-4998
Phone: 800-724-2120

Your broker then transfers DTC securities to:

LPL Financial
DTC #0075
For Credit to account titled:
Mohonk Preserve Account # 4172-0785

2. Once a stock transfer has occurred, Mohonk Preserve staff will be notified that the securities have arrived in our account.

3. The Preserve will send an acknowledgement letter to you upon notification that the securities transfer is complete. The acknowledgement letter will indicate the date the Preserve became the owner of the securities, the name of the stock, the number of shares, and the average price per share on the day of the donation. This is the value of the securities on the day of the donation for your tax purposes.