

# Gift of Stock Transfer



**Please complete this form, send it to your broker and return a copy to The Discovery.**

## Broker Information

Broker Name: \_\_\_\_\_

Broker Telephone: \_\_\_\_\_ Broker E-mail: \_\_\_\_\_

*Re: Electronic Transfer of Securities for Charitable Purposes*

## Transfer From

Account #: \_\_\_\_\_ Client Name: \_\_\_\_\_

Donor's Name (please print): \_\_\_\_\_

## Securities to Be Donated:

Company Name: \_\_\_\_\_ Number of shares: \_\_\_\_\_

CUISP #: \_\_\_\_\_

## Receiving Institution Information:

Charles Schwab & Co., Inc.  
6502 S. McCarran Blvd S-E  
Reno, NV 89509  
A/C # 91042538  
DTC# 0164 Code 40

Advisor's Firm: Vantage Wealth Planning  
Advisor's Name: Kyle McCann  
Phone: (775) 502-8484  
Fax: (775) 624-5009  
[kyle@vantagewealthplanning.com](mailto:kyle@vantagewealthplanning.com)

Nevada Discovery Museum  
dba Terry Lee Wells Nevada Discovery Museum (The Discovery)  
Tax ID #61-1474845

## Donor/Client

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Gift Recognition (e.g. The Smith Family):** \_\_\_\_\_

*If you have any questions regarding this form, please contact Danielle Williams at: Terry Lee Wells Nevada Discovery Museum  
490 S. Center Street · Reno, NV 89501 · Telephone: 775-398-5955 · FAX: 775-786-1114-1000 · E-mail: [dwilliams@nvdnm.org](mailto:dwilliams@nvdnm.org)*