



Charlottesville-Albemarle SPCA (CASPCA)  
3355 Berkmar Drive | P.O. Box 7047  
Charlottesville, VA 22901

P: 434.973.5959 | F: 434.973.5271

## Stock Gift – Sample Letter

Thank you for making a gift of stock to the Charlottesville-Albemarle SPCA! Please send the following sample letter to your broker.

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Date:

Dear (donor's broker):

I/we wish to donate (number) shares of (name of shares) stock/mutual fund held in my/our (name of brokerage) account, # (account number) to the Charlottesville-Albemarle SPCA (Tax ID # 54-0595009).

**Please transfer (number) shares to the CASPCA's brokerage account as follows:**

Charles Schwab & Co., Inc  
DTC Participant Number: 0164, Code 40  
Account Name: Charlottesville Albemarle  
SPCA Account Number #: 9138-8351  
Attention: Transfers, 800-435-1000

**Our Charles Schwab & Co., Inc contact in charge of transactions is:**

Elizabeth P. Morris  
Morris & Wells Wealth  
Management  
410 White Gables Ln.  
Charlottesville, VA 22903  
epmorris@morrisandwells.com

This donation represents my gift to the Charlottesville-Albemarle SPCA. It is imperative that you forward my name with the stock transfer to the CASPCA for gift verification purposes. If you have any questions about this donation, please call me at (donor's phone number).

Sincerely,  
(Donor's signature)

Cc:  
Hilary Bryan  
Director of Advancement, Marketing and Communications  
Charlottesville-Albemarle SPCA  
3355 Berkmar Dr; Charlottesville, VA 22901  
434-973-5959; [hbryan@caspca.org](mailto:hbryan@caspca.org)