



How to Give a Gift of Stock to The Spokane Symphony Annual Fund or The Spokane Symphony & Fox Theater Endowment Fund

Necessary Information for Stock Transfer

- Brokerage Firm: Merrill Lynch
- Contact: Merrill Lynch
- Portfolio Manager: Bob Larson & Jay Kirkpatrick
- Address: 601 West Riverside, Ste. 300; Spokane, WA 99201
- Magaly Pelayo direct line: 509-458-4293
- Direct Transaction (DTC) Number: #8862 (for all Symphony transfers)
- Acct. # for Symphony Annual Fund #70Q-04032
- Acct. # for Endowment #70Q-02002

When stock is transferred into our Merrill Lynch account, the **information regarding who gifted the stock is not included**, so it is very helpful for us to know this information in advance in order to advise our Portfolio Manager. When you are planning a gift of stock, it would also be helpful for you to alert Becca in the Development Department to that fact, along with the name of the stock, how many shares it will be, and an estimate of the stock's worth.

If you have any questions on this procedure, or just want a telephone number to call and advise us of your plans, please note the following:

Spokane Symphony office hours	9 AM to 5 PM, Monday through Friday
Symphony Fax Number	509-326-3921
Telephone number for Weiling Zhu (CFO)	509-464-7055
Email	WeilingZhu@spokanesymphony.org
Spokane Symphony Address	Mailing Address: PO Box 365 Spokane, WA 99210
	Physical Address: 818 W. Riverside Mezzanine Spokane, WA 99201
Spokane Symphony Society (Legal Name)	Tax ID #: EIN #91-0730435
Spokane Symphony & Fox Theater Endowment Fund	Tax ID #: EIN #91-1117140