



## How to Give a Gift of Stock to The Spokane Symphony Annual Fund or The Spokane Symphony & The 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 planning a gift of stock, please alert the Development Department, along with the name of the stock and how many shares it will be.

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
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

Spokane Symphony | PO Box 365 | Spokane, WA 99210-0365 | (509) 326-3136 | [donate@spokanesymphony.org](mailto:donate@spokanesymphony.org)

The Spokane Symphony is a nonprofit organization under Section 501(c)(3) of the US Internal Revenue Code (Federal Tax ID# 91-0730435) and registered with the Secretary of State, Washington State. Contributions qualify for the maximum charitable income tax deduction permitted by law.