

## INSTRUCTIONS FOR TRANSFERRING APPRECIATED SECURITIES

Making gifts of appreciated securities doesn't need to be complicated. When giving securities, please be sure to consult with your financial advisors and/or attorney. Additional time should be allotted for the completion of such gift transactions.

## TRANSFER INSTRUCTIONS FOR STOCK HELD WITH A BROKER (Securities held by your broker)

- 1. Call PetAid Colorado's Office of Development at 303.539.7635 to notify us of your gift.
- 2. Instruct your broker in writing to transfer the stock directly to PetAid Colorado's brokerage account (see below for details).
- 3. Confirm your gift with a letter to PetAid Colorado's Office of Development describing the securities, as well as specifying how your gift should be used by PetAid.

## **INSTRUCTIONS FOR STOCK HELD IN CERTIFICATE FORM (Certificates you hold)**

- 1. Call PetAid Colorado's Office of Development at 303.539.7635 to notify us of your gift.
- 2. Mail the unendorsed certificate, along with a letter of instruction, to PetAid Colorado's Office of Development.
- 3. In a separate envelope, mail a stock power (signed and dated) for each certificate to:

Office of Development PetAid Colorado 191 Yuma Street Denver, CO 80223

## For your convenience, PetAid Colorado's Brokerage Account Information is as follows:

DTC No: 0221
Account No: ABN 8383

Bank/Brokerage Firm: UBS Financial Services, Inc.

Attention: Jason W. Lord

Address: 370 17th Street, Suite 4100

 City:
 Denver

 State:
 Colorado

 Zip:
 80202-5697

 Telephone:
 303.436.9000

 Toll Free:
 800.722.2408

 Fax:
 303.820.5098

 PetAid Colorado's Federal EIN #:
 84-1612045

As with any decision involving your estate plans, we urge you to seek the advice of professional counsel when considering a gift to PetAid Colorado. Thank you for your time and consideration.