



## The Lewes Historical Society Procedure to Donate Stock

1. Provide written gift instructions to your broker or bank:

SAMPLE LETTER

I, John Doe, request that you transfer \_\_\_\_\_ (number) of shares

of \_\_\_\_\_ (corporate name) stock

from my account at \_\_\_\_\_,

account # \_\_\_\_\_

2. Ask your broker or bank to contact:

**Derek Clifton at the Edward Jones, Lewes**

302-645-6208

You may also stop by the Edward Jones, Lewes office at:

17577 Nassau Commons Blvd

Suite 101

Lewes, DE 19958

3. Also, please send a copy of the above correspondence to The Lewes Historical Society, including any special designation for the funds use, if any. Possible options are the Lewes History Museum, the Endowment Fund, LHS Campus Grounds, or a specific building or project. Send to:

Michael DiPaolo, Executive Director

The Lewes Historical Society

110 Shipcarpenter Street

Lewes, DE 19958

Or call 302-645-7670 and ask for our Executive Director, our Treasurer, or our Endowment Fund Chairperson. **Following one of these outlined procedures allows us to avoid unidentified gifts and to acknowledge your gift with a tax donation letter.**

NOTE: Your gift is valued on the day the stock is received in The Lewes Historical Society account.

Thank you for your gift to The Lewes Historical Society!



