

Bellevue Botanical Garden Society
Donation of Securities Instructions – As of Jan. 2021

You can transfer shares of Securities (Stocks, Bonds, Mutual funds & Money Market) electronically, either personally or through your broker. The following information should be used to transfer your securities donation to the Bellevue Botanical Garden Society a 501(c)(3).

Account Name: **Bellevue Botanical Garden Society, Tax ID: 91-1333659**
Account Number: **135-046062-298**
DTC: **0015**
Account Representative: **Puget Sound Wealth Management**
Morgan Stanley
601 Union Street, Suite 5200
Seattle, WA 98101
Phone: 206 343-2786
Email: karen.henderson@morganstanley.com

Unfortunately, an electronic transfer of shares to the BBGS account does not include the name of the donor. Therefore, to ensure that we credit you with your tax deductible donation, please notify our office that you have transferred a gift and provide your full name, the name and type of investment , and the number of shares donated to:

Courtney Voorhees - (425) 452-5248, email cvoorhees@bellevuewa.gov

Or mail:

Bellevue Botanical Garden Society
Attn: Courtney Voorhees
PO Box 40536
Bellevue, WA 98015

Valuation and Acknowledgement of Gift

Bellevue Botanical Garden Society will send an acknowledgment letter for tax purposes, indicating when the shares were received by the BBGS Morgan Stanley account, the name of the security transferred, and the number of shares in the transaction.

The value of your gift is based on the mean value on the day of acceptance. Gifts of securities will be converted to cash by the Society promptly.

Thank you for your support!