

115 West 8th Ave., Suite 115
Eugene, OR 97405
541.687.9487
Fax 541.687.0527
eugenesymphony.org



**EUGENE
SYMPHONY**

Francesco Lecce-Chong
Music Director and
Conductor

Scott Freck
Executive Director

INSTRUCTIONS FOR GIFTS OF STOCK OR MUTUAL FUNDS

Thank you for supporting the Eugene Symphony. Donating stock or other securities takes just three easy steps. Please keep in mind that your gift of stock or mutual funds must be received by the Symphony's broker by December 31, to count as a tax deduction in a particular calendar year.

Please contact us at 541.687.9487, x112 if you have any questions or need additional information.

1 PLEASE TELL YOUR BROKER TO DIRECT YOUR GIFT TO:

Ferguson Wellman Capital Management
888 SW Fifth Avenue, Suite 1200
Portland, OR 97204

Contact: Don Rainer | 503.226.1444 | 800.327.5765 | rainer@fergwell.com

Account Information:

Charles Schwab
DTC # 0164
Account # 8009-0782
Eugene Symphony Association, Inc.
Tax ID # 93-0556298

2 COMPLETE THE FOLLOWING INFORMATION:

Your Name & Address: _____

Preferred Phone (circle one: Home / Work / Cell): _____

Name of the stock or mutual fund: _____

Number of shares: _____ Date of gift: _____

3 SEND THIS FORM TO THE EUGENE SYMPHONY ASSOCIATION, INC.:

Email: lisa.raffin@eugenesymphony.org & sara.mason@eugenesymphony.org

Fax: 541.687.0527

Mail: Lisa Raffin, Finance Director
Sara Mason, Development Director
Eugene Symphony Association, Inc.
115 West 8th Avenue, Suite 115
Eugene, OR 97401

*Please note that this information sheet should not be interpreted as legal or tax advice
Please contact your accountant, attorney, or tax advisor for assistance regarding stock gifts you may be
considering making to the **Eugene Symphony Association, Inc.***