



## 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 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: Peter Jones | 503.226.1444 | 800.327.5765 | peter.jones@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: michael.anderson@eugenesymphony.org & gretchen.farrar@eugenesymphony.org  
Fax: 541.687.0527  
Mail: Michael Anderson, Interim Executive Director  
Gretchen Farrar, Development Director  
Eugene Symphony Association, Inc.  
115 West 8<sup>th</sup> 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.*