



## Gifts of Stock or Mutual Funds

A meaningful way to support our historic, nonprofit theater

### DONATE STOCK

Please provide the following information to your broker in order to make the stock transfer:

Brokerage Firm: M&T Securities  
 Broker DTC: 0443 - M&T Securities clears through Pershing  
 Our Account Name: The Friends Of The Mozartina  
 Our Account Number: AZD987931  
 Our Tax ID Number: 13-3020574  
 OBI: Donor Name

### DONATE MUTUAL FUNDS

Prior to initiating the transfer of mutual fund shares, please contact M&T Securities at 800-724-7788, select option #1, Monday – Friday between the hours of 8:30am – 5pm ET and a M&T Securities Client Solutions Representative will assist you. The following information is needed to determine eligibility of your mutual fund shares with M&T's Securities gift clearing services, and to assist you with the transfer of the shares:

1. Ticker symbol and name of mutual fund
2. Number of shares being gifted
3. Broker information, including:
  - o Name of brokerage firm
  - o Account number
  - o Phone number of the institution delivering the shares
4. Name of the donor
5. BIN Number\*

*\* Once eligibility of your gift of mutual fund shares is confirmed, M&T representatives will provide you with the appropriate BIN Number to receive your gift of mutual fund shares. The sending firm of your mutual fund donation must include a specific BIN number based on the shares being gifted when making the mutual fund transfer.*

Please share the following information with Sheila Emery Murphy, Director of Philanthropy, if you wish to make a gift of stock or mutual funds via [smurphy@tarrytownmusic hall.org](mailto:smurphy@tarrytownmusic hall.org) or 914-631-3390 x115. Once this information is received and our broker confirms the donation of securities, The Music Hall will issue an official acknowledgment letter to the donor. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift.

Name & Type of Securities | # of Shares | Date of Transfer

Donor's Name

Donor's Street Address

Donor's City/State/Zip

Donor's Phone Number

(Will only be used if question arises or a problem occurs in the donation process)

Broker's Name

Broker's Company

Broker's Phone Number

*The Tarrytown Music Hall | 13 Main Street | P.O Box 686 | Tarrytown, NY | 10591  
P 914.631.3390 | F 914.517.5927 | [info@tarrytownmusic hall.org](mailto:info@tarrytownmusic hall.org)*