



## INSTRUCTIONS FOR DONATING STOCKS, BONDS, AND MUTUAL FUNDS

Thank you for making a gift of your securities to Broadway Rose Theatre. Please fill out this form to contribute securities through your brokerage account. All contributions are irrevocable and are, in most cases, eligible for a tax deduction, but be sure to consult your tax advisor about your specific circumstances.

### This gift is from the following:

\_\_\_\_\_  I wish to remain anonymous.  
*Donor Name(s) as you would like it to appear in program*

\_\_\_\_\_  
*Address*

\_\_\_\_\_ *Phone Number* \_\_\_\_\_ *Email Address*

\_\_\_\_\_  
*Name and phone number for donor's broker*

\_\_\_\_\_ *Name and number of shares being transferred* \_\_\_\_\_ *Approximate value of gift*

### Step 1: Contact your financial broker

To transfer stocks, bonds, or mutual funds, please provide these instructions to your broker. Be sure to include the giver's name and Broadway Rose Theatre Company's name on all transactions.

#### Deliver all DTC Eligible Securities to:

**DTC Clearing #0075**

**LPL Financial**

**Account # 6632-8578**

### Step 2: Let Broadway Rose know

Please let us know that you will be making a contribution of securities by sending a completed copy of this form to:

deShauna Jones, Development Director

Broadway Rose Theatre Company

P.O. Box 231004

Tigard, OR 97281

Fax: 503.670.8512

email: [deshauna@broadwayrose.org](mailto:deshauna@broadwayrose.org)

We will send you a tax letter for your records upon receipt of the securities sale.

Thank you for your support!