INSTRUCTIONS FOR MAKING A GIFT OF STOCK TO BENEFIT THE JAMESTOWN HISTORICAL SOCIETY

BEFORE MAKING A GIFT:

Please contact the Jamestown Historical Society to let us know you plan to make a gift of stock. We need to ensure that when the securities are transferred to our broker, we can easily identify your gift.

Rosemary Enright 401-640-1800 or info@jhsri.org
Ross Williams 203-722-3961 or rosswilliamsz@gmail.com

TRANSFERRING SECURITIES:

The easiest way to gift securities is to instruct your Financial Advisor to make an electronic transfer to the Jamestown Historical Society's account held by Fidelity Investments.

WHAT HAPPENS NEXT?

Once the securities are deposited into the JHS Fidelity account and sold, the net proceeds will be used for general purposes unless you communicate a specific restriction. Any fees charged by Fidelity will be deducted from the selling price of the securities to arrive at the net proceeds.

We will issue an acknowledgement letter to substantiate this donation for tax purposes.

Do not hesitate to contact us with any questions about the procedures.

Thank you for your generosity!