



GIFTS OF STOCK TRANSACTION FORM

Thank you for making a gift of stock to the Chattanooga Symphony & Opera Association. Please complete this form and mail or fax it to the CSO with each gift. Also, please attach a copy of any correspondence you have with your stockbroker regarding this gift.

MAIL: Chattanooga Symphony & Opera Association
Attention: Development Department
630 Chestnut Street
Chattanooga, TN 37402

FAX: 423/265-6520
ATTN: Wade Kelley

Please provide your stockbroker with the following information:
Chattanooga Symphony & Opera Federal ID # - 62-6002098
DTC#0780
Morgan Keegan & Company, Inc.
For credit to: Chattanooga Symphony & Opera Association – Gift Account # 31744030

Donor Name: _____

Transaction Date: _____

Stockbroker Name: _____ **Stockbroker Telephone Number:** _____

Stock Name: _____ **Number of Shares:** _____ **Approximate Gift Value:** _____

I would like this gift of stock to be directed to (please check):

- Friends of the CSO
- I would like to take advantage of the Friends Benefits.
- I would like to waive all non-tax-deductible benefits and receive full charitable value for my gift.
- Education
- CSO Endowment Fund
- Concert Sponsorship
- Other – please explain _____

Donor Signature

Date

Telephone Number

Please mail or fax to the Chattanooga Symphony & Opera

Thank you for your support.

You will receive a tax receipt for your records once the stock has been received.

If you have any questions, please contact Wade Kelley, Director of Development

at 423/267-8583, ext. 108 or wadek@chattanoogasympphony.org