



## **Instructions for the Donation of Stocks, Bonds, or other Securities to Dovetail Partners**

*Thank you for your interest in supporting Dovetail Partners, a 501(c)(3) non-profit organization (Federal Tax ID: 52-2419510). To help you facilitate a gift of stocks, bonds, or other securities please follow these steps:*

### **Step 1 - Initiate the Securities Transfer**

Securities can be gifted to Dovetail Partners via electronic transfer (in which your broker transfers shares using Dovetail Partners' DTC number). It is necessary for you to contact your broker to initiate the transfer. (The next page provides an example of a letter template to initiate the stock transfer.)

### **Step 2 - Notify Dovetail Partners of Your Intended Donation**

Contact Dovetail Partners via phone, email, or written letter to notify us of your planned donation. Please include information about the date of the transfer, amount, number and type of securities, contact information for the broker and contact information for yourself (the donor). Dovetail Partners can be contacted at [info@dovetailinc.org](mailto:info@dovetailinc.org), 612-333-0430 (phone) or 528 Hennepin Ave, Suite 703, Minneapolis, MN 55403.

### **Step 3 - Send the Securities to Dovetail Partners**

Ask your broker to donate through Wells Fargo Advisors:

Wells Fargo Clearing Services, LLC

C/O Wells Fargo Advisors

DTC Number: 0141

ACCT Name: Dovetail Partners Inc. (Tax ID# 52-2419510)

ACCT Number: 5540-9302

*Sample Letter to Broker to Initiate Donation:*

Dear:

I would like to make a gift of stock on [insert date] to Dovetail Partners. Please transfer [number] shares of [company name] to the charity on [indicate month, year when you would like transfer to occur].

Use the following transfer instructions:

Wells Fargo Clearing Services, LLC  
C/O Wells Fargo Advisors  
DTC Number: 0141  
ACCT Name: Dovetail Partners Inc. (Tax ID# 52-2419510)  
ACCT Number: 5540-9302

It is important to notify the Gift Processing Department of the gift being transferred.

Contact information is as follows:

Dovetail Partners  
Attn: Gift Processing Dept.  
528 Hennepin Ave, Suite 703  
Minneapolis, MN 55403  
612-333-0430 (office)  
[info@dovetailinc.org](mailto:info@dovetailinc.org)

Dovetail Partners will also provide me with a receipt for this gift.

Thank you for your prompt attention to this matter.

Sincerely,

cc: Dovetail Partners