



## Donation of Stock

A gift of stock to the National Marine Sanctuary Foundation supports our work with communities to conserve and expand U.S. protected waters, ensuring a healthier ocean, coasts, and Great Lakes for generations to come. Before making a gift, please discuss your potential tax benefits with your financial advisor.

### Instructions for Stockbroker or Agent

To transfer stocks to the National Marine Sanctuary Foundation, please use the following account information:

DTC#: 0226 (Fidelity Account)  
For Credit: National Marine Sanctuary Foundation  
Account #: RT8-000869  
Contact: Parth Patel, [ppatel@rockco.com](mailto:ppatel@rockco.com)

Gifts will be recorded on the day they are received in our brokerage account at the median market value. You will receive a written acknowledgment to confirm receipt of your gift, the number of shares, the dates they were received in our account, and the high and low values per share on the date the securities were transferred.

### Stock Notification Form

Please notify the National Marine Sanctuary Foundation of your intent to transfer stock so we can identify the gift when it arrives and ensure you receive credit. Please complete the following Stock Transfer Notification Form and email or mail a copy of the Foundation.

For more information, please contact [development@marinesanctuary.org](mailto:development@marinesanctuary.org)  
or call 301.608.3040.

**Thank you for your support!**

*The National Marine Sanctuary Foundation is recognized by the IRS  
as a 501(c)3 public charity, Federal Tax ID 94-3370994.*



## Stock Transfer Notification Form

### Contact Information

Name: Mr. Ms. Mrs. \_\_\_\_\_  
*(circle one)*

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Gift Information

Stock Name/Symbol: \_\_\_\_\_ # of Shares: \_\_\_\_\_ Transfer Date: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

I (we) would like to be acknowledgment for this gift as:

\_\_\_\_\_

Additional Comments: \_\_\_\_\_  
*(including donation designation if appropriate)*

### Please return this form to:

**Address:** National Marine Sanctuary Foundation  
Attn: Development  
8455 Colesville Road, Suite 1275  
Silver Spring, MD 20910

**Email:** [development@marinesanctuary.org](mailto:development@marinesanctuary.org)

You may be eligible to increase the impact of your gift with employer matching funds.  
Check with your employer for more information.

**Thank you for your support!**

*The National Marine Sanctuary Foundation is recognized by the IRS  
as a 501(c)3 public charity, Federal Tax ID 94-3370994.*