



How to Make a Gift of Stock

IMPORTANT

As soon as possible after taking one of the below steps, please contact Cathy Eddy, Finance Director (contact information below), and let her know the arrangements you have made, including the name and number of shares you are contributing. Contacting HOPE prior to your gift transaction ensures that we attribute it correctly – a broker may execute a transfer of stock to the HOPE account without a donor's name.

1. If your securities are held in "street name" at a brokerage firm or bank:
 - Have your broker or trust officer contact us about your gift. Shares can be sent to HOPE using the instructions listed below. You may also contact Paul J. Valente at Community Financial Services Group in Middlebury, Vermont at (802) 388-6948 or valentep@ceteranetworks.com.

Cetera Advisor Networks

DTC 0443

ACCT#: 5CT-102440

FBO: Addison County Community Action Group (HOPE)

2. If your securities are held in a Community Financial Services Group account:
 - Send written authorization to your Trust Officer to journal the gift from your Community Financial Services Group account to:

Cetera Advisor Networks

DTC 0443

ACCT#: 5CT-102440

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3. If you hold the actual stock certificate(s):
 - Send the unendorsed certificate(s) (by certified mail if you prefer) to:

HOPE

Attention: Cathy Eddy, Finance Director

282 Boardman Street, Suite 1A

Middlebury, VT 05753

- In a separate envelope, mail a signed stock power form, with your signature guaranteed by a commercial bank or brokerage firm, by ordinary first class mail to the same address as the certificate. Stock power forms can be obtained from your bank or brokerage firm. Include a brief letter stating that the securities are a gift to HOPE. We use the letter as authorization to deposit the securities directly into our account.

If you have any questions about how to donate securities to HOPE, don't hesitate to contact Cathy Eddy, Finance Director, ceddy@hope-vt.org or 802-388-3608, ext. 240.