



Connecting Students & Volunteers
for Results that Count

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Donating Stock to Heart Math Tutoring

Contact Heart Math Tutoring First

Thank you for choosing to give a gift of stock to Heart Math Tutoring!

Information that you provide your broker is not passed on to Heart, so it is important for you to inform Heart about the details of your gift.

If you are donating shares of stock to Heart Math Tutoring, **please contact Heart's Donor Relations Manager** Mary Davies at mary.davies@heartmathtutoring.org or 704-280-3136. We will ask for the name of the stock, the number of shares, and your contact information for acknowledgment purposes.

Required Information

You will need the following information to donate stock to Heart. Please contact Mary Davies if you have any additional questions.

Brokerage Firm Name: Truist (BB&T)

Name of the account: Heart Math Tutoring

Account number: WA8112988

DTC number: 0226

Heart Math Tutoring EIN: 46-4366030