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Transferring Stocks and Securities

Gifts of stocks and securities can be a beneficial way to contribute to Durham Habitat, because capital gains taxes may be avoided if the gain is used to make a charitable gift. The value of the gift is established as the fair market value of the stock on the date of transfer.

To best facilitate the transfer and acknowledgment of your stock gift, please notify us of your name, the name of the stock, and the number of shares you are donating before you transfer the stocks. Contact Jill Wright via email or at 919.682.0516 x 109 to share your plans. Your broker can easily facilitate the transfer to Durham Habitat by using the following information:

Electronic Transfers

Edward Jones Investments
919.401.5277
(fax) 877.786.2799
DTC #: 0057
FBO (for benefit of): Habitat for Humanity of Durham
Edward Jones account number: 223-06962-1-9

Certificate Transfers

Please mail or deliver the certificate with a cover letter to:
Edward Jones Investments
6340 Quadrangle Dr., Suite 90
Chapel Hill, NC 27517

For questions about electronic or certificate transfers, contact:

Patrice Hewlett Branch Office Administrator Edward Jones
(919) 401-5277
patrice.hewlett@edwardjones.com