



**Stock Transfer Instructions**

***Request for your Broker to make a stock transfer on your behalf.***

By this letter, I request to make a gift of securities from my personal account at \_\_\_\_\_ (include your account number/information) to Opera Birmingham. I would like to gift \_\_\_\_\_ (number of) shares of \_\_\_\_\_ (stock name and symbol). Please deliver according to the following instructions:

Broker: LPL Financial Account Registration Name: Opera Birmingham, Inc. DTC #0075 Account Number: 4445-3228
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In your transmittal to Opera Birmingham (tax ID #23-7207572), please indicate my name as the stock owner of record in connection with the transfer. Please copy me on your transmittal. Thank you.

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Donor Name

Date

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Donor Address, City, State, Zip

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Donor Email

Donor Preferred Phone

Any statements contained herein are not intended or written to be used, and cannot be used, by the recipient or any other taxpayer, for avoiding penalties that might be imposed by federal tax law.

10/6/2021



**STOCK TRANSFER NOTIFICATION**

**To notify Opera Birmingham of a transfer of stock initiated by you.**

Send to:

Office of Development  
c/o Opera Birmingham  
3601 Sixth Avenue South  
Birmingham AL 35222

Email: [lynne@operabirmingham.org](mailto:lynne@operabirmingham.org)

I am pleased to inform you that I requested that my broker, \_\_\_\_\_, make a gift of \_\_\_\_\_ (number of shares) shares of \_\_\_\_\_ (stock name and symbol).

Upon receipt of the sale of stock, please send me a written acknowledgement that states the amount of my gift, and that confirms no goods or services were transferred to me in consideration for this gift.

My gift should be allocated to the following purpose:

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*(If no purpose is stated, funds will be directed to greatest need of Opera Birmingham)*

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Donor Name

Date

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Donor Address, City, State, Zip

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Donor Email

Donor Preferred Phone

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