

## **Hope Academy GSO, Inc. Stock Gifting Instructions**

Hope Academy is always grateful for donations that come through stock sales. We have received many of them over the years. However, on occasion, in the past, Hope Academy sometimes received stock gifts without knowing who provided the contribution. We have, through Interactive Brokers, tightened the procedures for gifting stock for two reasons: 1. to ensure stock donations happen in a manner that will help us properly credit and thank donors for their generous donations. 2. Will ensure to the donor that their contribution has reached Hope Academy.

*From Lisa Anderson at Anderson Financial, who handles stock donations on behalf of Hope Academy.*

Interactive Brokers has now closed the loop on receiving unexpected stock gifts. Now, the donor/or their broker needs to contact Lisa FIRST and share what they are gifting and when. (Lisa Anderson's contact information is below.) Then, she will set up receiving instructions based on this information for Hope Academy to receive in the stock gift.

**If a stock gift is made without prior notification to Lisa Anderson at Anderson Financial, then the stock gift could be rejected.**

Contacting Lisa first will prevent Hope Academy from receiving donor stock without our knowledge and will also prevent Hope Academy from receiving a stock gift and not knowing who gifted it. This extra step of contacting Lisa first in the process has been added to ensure that Hope Academy and the donor always know who gave each stock donation and that it has been received.

Thank you. We are grateful for your support.

Regina Clark  
Director of Development  
Founding Executive Director  
(336) 202-9898  
[Rclark@hopeacademygso.org](mailto:Rclark@hopeacademygso.org)

## **Hope Academy GSO, Inc. Stock Gifting Instructions**

Thank you for your interest in supporting Hope Academy GSO, Inc. If you want to donate stock, bonds, insurance proceeds or any financial security to Hope Academy GSO, Inc. or investigate charitable giving/ estate planning, please contact:

**Lisa A. Anderson**

President/ Anderson Financial, Inc.

3817 Lawndale Drive, Suite B-1

Greensboro, NC 27455

(office) 336-299-8280

(cell) 336-549-0474

fax: 1-800-886-9676

toll free: 1-866-888-0747

email: [lisa@andersonfinancial.us](mailto:lisa@andersonfinancial.us)

**\*\*\* Individuals must contact Lisa *before* they make a donation to Hope Academy GSO, Inc. and let her know what item will be gifted, the number of shares, and exactly when the gift will be made. This will ensure that the individual will receive proper credit for their gift, and that Hope Academy GSO, Inc. can accurately process their donation.**

The instructions to deposit physical securities are as follows:

Interactive Brokers, LLC

1 Pickwick Plaza

Greenwich. CT 06830

866-694-2757

FBO Hope Academy GSO

Account #: U12409739

The wiring instructions for U.S. stock and bond gifts are to be transferred via Free Of Payment by the following instructions:

DTC # 0534

FBO Interactive Brokers LLC

FBO Hope Academy GSO

Account #: U12409739

For all other securities, certificates, and NON-ACAT deliverable items, please contact Lisa. Thank you for your generosity and the support you have given to Hope Academy GSO, Inc. Lisa Anderson is available to answer any questions you may have or to be of service to you in any way.