

Utah Symphony | Utah Opera Stock Gift Instructions

Thank you for your interest in making a gift of stock to Utah Symphony / Utah Opera! Below are some instructions to assist you in executing your transfer.

Step #1: Notify the Utah Symphony | Utah Opera Development department of your gift. In order for us to correctly identify your generous gift and issue the proper tax receipt, please be sure to inform us.

Please be prepared to provide the following information:

- Name of securities and number of shares
- Brokerage house/accounting firm, contact name, and phone number
- Your address, phone number, and e-mail address

Please send your stock gift notification to:

Email:

shogan@usuo.org – Steve Hogan

Donorservices@usuo.org – Development office

Phone:

801-869-9057 – Finance office

801-869-9200 – Development office

Mail:

Utah Symphony | Utah Opera

Abravanel Hall

123 West South Temple

Salt Lake City, UT 84101

Step #2: Please provide your financial advisor with the following information for USUO's account with Wells Fargo Advisors.

Account Name: Utah Symphony & Opera

Internal Account Number: 1521-2774

DTC Number: 0141

Tax ID: 51-0145980

Wells Fargo Advisor: Alan Hawkins

Phone: 801.302.3330

Fax: 385.415.8512

E-mail: alan.p.hawkins@wellsfargo.com

Utah Symphony | Utah Opera values gifts of stock based on the average of the high and low price of the stock on the day the stock is transferred into our account. Acknowledgements of the gift will be sent directly to the donor.

If you have any additional questions, please contact Steve Hogan at 801.869.9057.

THANK YOU!