

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

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

Email: alan.p.hawkins@wellsfargo.com

STEP 2

Notify Utah Symphony | Utah Opera of your gift.

This will help us identify your gift and issue the proper tax receipt.

Please provide:

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

EMAIL

Jeffrey Andreasen, CFO

jandreasen@usuo.org

Development Department:

donorservices@usuo.org

PHONE

Jeffrey Andreasen, CFO

[801-869-9057](tel:801-869-9057)

Development Department:

[801-869-9200](tel:801-869-9200)

MAIL

Utah Symphony | Utah Opera

Attn: Development

123 West South Temple

Salt Lake City, UT 84101



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 Jeffrey Andreasen at 801-869-9057.