



INSTRUCTIONS FOR MAKING A GIFT OF STOCK TO HERITAGE ACTION

The simplest way to make a gift of stock is to contact your broker and electronically transfer the stock from your account to our account at Truist Bank.

HOW TO MAKE AN ELECTRONIC TRANSFER

- 1 Provide your name, your phone number, the name of the stock you are giving and the number of shares (e.g. 20 shares of Microsoft)
- 2 Call your broker with the information below:

Name Truist Bank
Contact Laura Galaida, Client Manager
Address 1445 New York Avenue, NW 4th Floor, Washington, DC 20005
Phone 202-661-0741
Fax 801-565-2926
DTC Number 2039 (Truist clears through SEI Trust Company)
FFC Truist Bank a/c 11188
HAFAs Stock Account 7934873

Please include a note that the stock gift is for Heritage Action for America.