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My Possibilities – Instructions for Giving Gifts of Securities (Stocks or Bonds)

To Whom It May Concern,

Thank you for your interest in supporting My Possibilities through a stock donation. Appreciated securities can be one of the most cost-effective assets to use in making a gift. To make a gifting of stock to My Possibilities, please send the position(s) to:

My Possibilities Account Details	
Account Name	My Possibilities – Gifting Account
Account Number	036-29313
Broker DTC Number	0013
Investment Advisor	Lisa Johnson Kelly, CFP® Vice President – Client Advisor T: 612-758-5027 F: 612-758-5050 lisa.johnsonkelly@bernstein.com

It is important that you alert us in advance letting us know the name of the stock and number of shares you plan to give. You can do so by contacting Jeanine Alpert at (469) 241-9100 or via email at jdalpert@mptx.org.

When your stock gift is received, we will mail you a tax receipt stating the name of the stock, the number of shares and the fair market value on the date it was received by My Possibilities.

Thank you,

Jeanine Alpert
Director of Community Engagement & Strategic Partnerships
My Possibilities

