**Information Guide to Make a Gift of Stock**

**To Homeward Bound, WNC**

Pershing, LLC handles stock transfers for Homeward Bound WNC.

**Step One: Contact and Transfer Stock to Homeward Bound Account**

Donors or their financial advisors are encouraged to contact Josh Tallent, to verify Homeward Bound account information.

Advisor Josh Tallent – 828-365-7294, [josh.tallent@hometrustbanking.com](mailto:josh.tallent@hometrustbanking.com)

HomeTrust Investment Services  
5 Northridge Commons Parkway  
Weaverville, NC, 28787

Pershing, LLC  
DTC #-0443  
Homeward Bound Stock Transfer Account #5EN-038471

**Step Two: Inform Homeward Bound, WNC**

Stocks are transferred by the name of the stock, and sometimes the donor name is not included. Inform Homeward Bound of the type of stock donated and estimated stock value by calling Jim Lowder at 828-337-4623 or emailing him, [jim@homewardboundwnc.org](mailto:jim@homewardboundwnc.org), so we can monitor the Homeward Bound account for the transaction and provide proper acknowledgement.

Thank You!