



How to Make a Gift of Stock to Homeward Bound of WNC

Step 1: Contact your Advisor or Firm and provide them with Homeward Bound of WNC Account Details

Homeward Bound of Western North Carolina

Account Number: 5EN-038471

HomeTrust Investment Services

5 Northridge Commons Parkway, Weaverville, NC, 28787

Clearing Firm: Pershing, LLC

DTC #-0443

Donors or their financial advisors may also contact Josh Tallent at HomeTrust Investment Services to verify account information at 828-365-7294 or josh.tallent@hometrustbanking.com

Step 2: Inform Homeward Bound of WNC of your Gift

Stocks transfers often just show the name of the transferring firm and the name of the donor is NOT included. Please inform us of the details of the stocks donated (company name, # of shares) and estimated value by contacting **Jessie Figueroa** at (828) - 793 - 0072 or at jessie@homewardboundwnc.org, so we can monitor the Homeward Bound account for the transaction and provide proper acknowledgement.

Thank You!
