



Directions on how to make a gift of Stock

TVS works with two brokerage firms for stock transfers -- UBS and Merrill Lynch. Below is contact and account information for both firms. **Please NOTE: It is essential that you call or email TVS to inform us of the number and type of securities you transfer so that we may properly credit your gift.**

Here are the contacts and account numbers. Both of these will accept stock gifts on Trinity Valley's behalf. If you have any further questions please call or email Amy Adkins, adkinsa@tvs.org or 817-321-0112.

UBS

Carla Thompson
carla.thompson@ubs.com
817-347-3552

Marlie Thomas
Marlie.thomas@ubs.com
817-347-3585

DTC 221
Account FW-C0050-10

Merrill Lynch

Ingrid Anderson
817-759-8390

Susanne Barefield
Suzanne_barefield@ml.com
817-759-8394

DTC 8862
Account 55M-04B03
<https://fa.ml.com/texas/fort-worth/mmkgroup/>