



Stock Donation Instructions:

1) Information for Custodian TOA paperwork:

DTC # 0226

Name of Receiving Institution: National Financial Services, LLC

Account Title (and/or Registration/FBO): Legacy Trust Company

Account Number: 635-601652

Mailing Address: 4200 Marsh Landing Blvd. Suite 100

Jacksonville Beach, FL 32250

Phone Number: 904-280-9100

DO NOT type "LIFEWORX LEADERSHIP" in the Account Title or Registration section of TOA paperwork!

2) After submitting TOA paperwork to your custodian, please email or call Kristin McLauchlan at kdm@legacytrustcompany.com (904) 280-9100

With the following information:

Donor Name: _____

Donor Phone Number: _____

Stock Donated & Number of Shares: _____

You may also email Tammie McClafferty at tammie.mcclafferty@lifeworkleadership.org
With information about your donation.