

HOW TO MAKE A GIFT OF STOCK OR OTHER SECURITIES



Edward Jones handles charitable transfers for Mountain Housing Opportunities. They accept and process gifts of stock and other securities, including mutual funds.

STEP ONE: CONTACT EDWARD JONES

Please contact or have your financial advisors contact Katherine Morosani, Edward Jones Financial Advisor, or her assistant Rachel Wolk, to start the transfer process. Transfers must be verified over the phone.

Phone: (828) 793-4310

Email: katherine.morosani@edwardjones.com or rachel.wolk@edwardjones.com

Address: 10 Crispin Ct, Suite 101, Asheville, NC 28803

STEP TWO: NOTIFY MOUNTAIN HOUSING OPPORTUNITIES TO YOUR GIFT

Please alert MHO staff to your gift. Charitable gift transfers detail the type and/or shares of stock or securities transferred but do not include donor information. Contact Allison Rollison, Director of Philanthropy, at 828.254.4030 ext. 136 or allison@mtnhousing.org and share the type of stock or securities and estimated value at the time of transfer so we may provide you with an appropriate acknowledgment and tax receipt.

Please note that MHO does not hold stock or securities, but converts these transfers to cash value as soon as possible upon receipt.

Thank You!

Mountain Housing Opportunities | 64 Clingman Ave, Suite 101 | Asheville, NC 28801

Mountain Housing Opportunities is a private, non-profit community development corporation whose mission is to build and improve homes, neighborhoods, communities, and lives, and build hope and dignity in the people we serve.