



# GIFT OF STOCK FORM

Thank you for your interest in making a charitable donation to the Community Foundation of North Central Washington (CFNCW) in the form of a Stock Transfer. Please complete and return this form to receive your tax-acknowledgement.

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to CFNCW. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to CFNCW (tax # 91-1349486), please note the following:

- Brokerage House: Charles Schwab
- Account Name: Community Foundation of North Central Washington
- Account Number: 4480-6710
- Telephone Number: 800-515-2157
- DTC Number: 0164
- Reference: Donor Name (Including your name will ensure the gift is properly acknowledged)

Please complete the information below to notify CFNCW of your gift and help ensure it is processed accurately. Please scan and email the completed information to [kristy@cfncw.org](mailto:kristy@cfncw.org).

## Donor & Securities Information:

Name & Type of Securities: \_\_\_\_\_

Security Symbol: \_\_\_\_\_ No. of Shares: \_\_\_\_\_ Transfer Date: \_\_\_\_\_

Donor Name: \_\_\_\_\_

Donor Street Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Broker Name: \_\_\_\_\_

Broker Company, City, State: \_\_\_\_\_

Broker Contact / Telephone Number: \_\_\_\_\_

Donor Telephone/Email Address: \_\_\_\_\_

Name of fund you would like this gift applied: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date Signed: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date Signed: \_\_\_\_\_

Note: All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

**THANK YOU AGAIN FOR CONSIDERING CFNCW AS THE RECIPIENT OF YOUR CHARITABLE GIFT!**