



STOCK GIFT INSTRUCTIONS

Donating appreciated stock, bonds or mutual funds

When you make a gift of securities, **we will not receive information that identifies you as the donor.** To ensure that you receive **proper tax acknowledgement** of your gift, please let us know by emailing khicks@keironw.org or by calling **206-726-6460**.

There are many benefits to gifting stocks:

- ✓ Avoid Capital Gains Tax
- ✓ Streamlined Gifting from Investment Accounts
- ✓ Receive a Charitable Tax Deduction
- ✓ Estate Planning Advantages
- ✓ Greater Giving Potential
- ✓ Easy to Execute with Your Broker

Please provide your **financial professional** with the following securities transfer information:

Schwab DTC Clearing Number: 0164

Schwab Account No.: 3681-4013

Registration: Keiro Northwest

Contact name: Bo Lee (206-338-9180)

