

Stock Donation Instructions

To donate stock, please follow the instructions below. You should also contact your stock broker, tax advisor, or financial consultant for more details about making your donation in the form of stock.

Step 1. Complete the pledge process and indicate “stock” as your giving method. Also include the approximate stock cash value.

Step 2. Send the following two items to your broker or financial consultant: 1) a letter authorizing the transfer of stock as a charitable contribution to Ann Martin Center, and 2) the Stock Transfer Verification Form. Please complete Section I of the Verification Form before sending to your broker. Once the stock transfer is complete your broker **must** complete Section II of the Verification Form and return it to Ann Martin Center. A copy of the form and a sample broker letter has been provided.

Include the following details in the letter to your broker:

- Expected date of transfer of shares
- Number of shares
- Name of stock
- Your mailing address
- Daytime phone number(s)
- Name of charitable agency receiving shares
- Agency contact information

Step 3. Send a copy of the broker letter to your designated agency for acknowledgment and tax purposes. At this point, you have completed your portion of the stock donation process.

Your broker will need the following information from Ann Martin Center:

- Agency Account Name: Ann Martin Center
- Broker: First Clearing LLC/Wells Fargo Advisors
- Account number: 7592-8782
- Federal Tax ID number: 94-6099000
- DTC #: 0141

ANN MARTIN CENTER STOCK TRANSFER VERIFICATION FORM

SECTION I. DONOR INFORMATION

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone: _____ Email: _____

SECTION II. STOCK GIFT (Details of Transfer)

Name of Brokerage Firm: _____

Symbol: _____ Quantity / # of Shares: _____ Date of Transfer: _____

- Agency Account Name: Ann Martin Center
- Broker: First Clearing LLC/Wells Fargo Advisors
- Account number: 7592-8782
- Federal Tax ID number: 94-6099000
- DTC #: 0141

Certification:

I agree to transfer gifts of stock to Ann Martin Center as indicated above.

Signature: _____ Date _____

For any questions related to the stock transfer, please contact either:

Lynn Peralta
Development Director
Ann Martin Center
1375 55th Street
Emeryville, CA 94608
(510) 655-7880 ext. 308
Email: lperalta@annmartin.org

OR

Mojgan Vijeh
Chief Financial Officer
Ann Martin Center
1375 55th Street
Emeryville, CA 94608
(510) 655-7880 ext. 241
Email: mvijeh@annmartin.org

Sample Stock Donation Letter

<name>

<address>

<city/state/zip>

<daytime phone>

<email address>

<today's date>

<insert broker name>

<mailing address>

<city/state/zip>

Dear <broker contact name>:

I would like to make a charitable donation to the Ann Martin Center. Please complete this transaction before/on <insert date>.

I would like to donate <insert # of shares> shares of common stock in <insert company name>. The current value per share is \$<insert average price as of today's date>. The approximate total value of my donation is <insert dollar amount (average price value X # of shares)>.

If you have any questions, please feel free to contact me. Thank you for your assistance.

Sincerely,

<insert your name>