

Wood River Trails Coalition

Stock Donation Instructions



1. Contact your advisor and/or broker and ask them to:

Transfer the securities to Charles Schwab using the following details:

- DTC Clearing #0164
- Credit to Schwab – Wood River Trails Coalition Account No. 4138-7826
- The securities are transferred electronically from one securities firm to the other using the DTC Clearing Number 0164. Be sure to specify the exact date on which you wish the securities transferred to the WRTC

2. Call the WRTC's Office at (208) 471-8152 or reach out via email to indicate the following:

- The name and city of your brokerage firm;
- The stocks being transferred;
- The date of the transfer; and
- The name of the account representative or assistant and their phone number (in case there are any questions or issues with the transfer).

The date of transfer is the date of your gift. The value of the gift is determined by multiplying the number of shares times the mean between the high and low as traded over-the-counter (per IRS regulations). The WRTC's policy is to sell the securities received as gifts upon receipt (within five business days maximum).

For any questions or for assistance, please contact Liz Pedersen, Development Director at epedersen@woodrivertrailscoalition.org