

Interfaith Caregivers of Polk County, Inc.
Electronic Transfer of Stock/Bonds/Securities/Mutual Funds

Thanks you for your recent inquiry about donating stock to Interfaith Caregivers. Your donation to our program will share the "Gift of Independence" with many elderly and adults living with disabilities.

The gift of appreciated stocks that have increased in value (and which the donor has owned for more than a year) provides greater tax benefits to the donor than giving money. Not only can the donor deduct the full market value of the securities, but also can avoid paying capital gains tax on the appreciation.

Making a gift of stock to our program is a relatively simple procedure. First, you will need to tell your broker to electronically transfer the stock to Interfaith Caregivers. Your broker will need the following information to complete the transfer:

Broker: **Invest Financial Corp/Pershing**
Account Representative: **Matt Casey**
Deliver Trust Company (DTC) Number: **0443**
Interfaith Caregivers Account Number: **5ZV-067011** (both zeros)
Beneficiary: **Interfaith Caregivers of Polk County, Inc.** EIN: **39-1837906**

The donor's name does not always appear on the stock transfer information, so please ask your broker to add your name in the subject line of the transfer so that we can match it with your gift record. After you instruct your broker to make the stock transfer, we ask that you call or write us to let us know of your gift. Please share the following:

- Name of stock transferred
- Number of stocks
- Brokerage firm stock transferred from
- Approximate date of transfer

For additional information, please contact:

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*A Neighbor's
Independence
Depends On You*

**FAITH
IN ACTION**