



DONATING STOCK via Broker Wire Transfer

Donating securities continues to be an effective way to give. Depending on your situation, you may be able to avoid capital gains tax on the appreciation and receive a charitable deduction for the full fair market value of your donation.

We accept publicly traded stocks, mutual funds, bonds, and publicly traded stock certificates that you hold personally. We recommend you consult your tax advisor to determine the best assets to donate.

Transfer instructions to donate stock to the Fresno Mission:

Contact your brokerage firm and give them our **DTC # 0075**

The account registration to receive the shares is:

Fresno Rescue Mission, FDN Acct. # 7971-5090

Please send the information below to Nathan Freeland at nfreeland@fresnomission.org or call 559-293-4541 for additional questions.

In order for us to properly match the gift with the donor please provide the following:

1. Donor name, phone number, address, and email.
2. Broker name and contact information.
3. Donated stock or mutual fund.
4. Number of donated shares.
5. Date you plan to schedule the transfer.

When the security transfer is received into Fresno Mission's brokerage account, we will mail a gift receipt letter to you.

Your gift of securities is valued as of the day it reaches our account if your broker transfers them electronically. Your gift value on that date is the average of the high and the low prices for the stock or the closing price if mutual fund shares are donated.

Consult with your broker for the optimum time for executing the wire transfer. It is suggested that year-end stock gifts be coordinated with your broker early in December to meet their year-end transfer cut-off date.