

## DONATIONS of STOCK

Thank you for your generosity and belief in nature education and connection! Here are the steps for making a donation of stock to Wild Whatcom:

1) Notify your broker that you are making a gift of stock to Wild Whatcom, including the following information:

- Name of the stock and number of shares you wish to transfer
- Wild Whatcom's brokerage account information:

**AmeriTrade**

**Account Name: Wild Whatcom**

**Account #235448906**

**DTC# 0188**

**Phone# (800) 669-3900**

Note: For online brokerage accounts, there is typically a downloadable transfer form for charitable purposes in the "forms" section that can be signed and returned to your broker via mail, fax or secure online communication channels.

2) Please send Rachel Budelsky, Operations Director at Wild Whatcom, the following:

- Approximate value of shares
- Anticipated date of transfer
- Gift Designation
  - o unrestricted
  - o a specific fund – please reach out to Rachel for more information if uncertain
- Your contact information and how you would like to be recognized

Rachel's contact information is: phone 360-966-6393, or email [rachel@wildwhatcom.org](mailto:rachel@wildwhatcom.org)

3) Once the stock is received in our brokerage account, we will instruct our broker to sell (immediately in most cases) and the proceeds will be credited to the appropriate fund depending upon your stated desire, above.

4) Wild Whatcom will send you acknowledgement of the donated value (tax-deductible amount) for your records after the sale.

5) If you have any questions, please contact Rachel (information above) or Licia Sahagun, Executive Director at [licia@wildwhatcom.org](mailto:licia@wildwhatcom.org).

**THANK YOU!!**