



SPLASHForward Stock Transfer Instructions

2021

We are very grateful for your transfer of stock to support our SPLASHForward efforts and our shared goals for much needed new public aquatics facilities. Your gift, whether cash or appreciated securities, is a vital part of supporting our development costs to retain professional services and support our organizational costs as we advocate and lead the private funding effort. We are deeply committed to forging the relationships, building the needed partnerships, and bringing a new public aquatic facility to life with you and our partners.

Thank you!

Stock Transfer Instructions

1. Please notify us **before you initiate a stock transfer** so that we can identify your gift when it is received and acknowledge it in a timely manner.
2. Please send the following information to your broker and to us at treasurer@splashforward.org. You can also reach us at 425-381-1014. Below is our broker information and a template for your broker.
 - Name of Donor
 - Name of Stock
 - Number of Shares
3. Please send us your **contact information** and your **preference (email or physical mail)** for us to send your gift acknowledgement and tax receipt.

Broker Information

DTC #0164
Account Number: 1855-3968
Account Name: SPLASHForward
Name of Receiving Institution: Charles Schwab
Contact Name at Brokerage: Stephanie Fox
Contact Information: (206) 664-6813

Donations of appreciated securities, which are typically common stock, provide a tax-efficient way of making your gift to SPLASHForward. Gifts of appreciated securities held for more than one year entitle you to a charitable income tax deduction for the fair market value of the securities on the date of the gift, i.e. when you transfer the securities to our SPLASHForward brokerage account. You also avoid the capital gains tax that would otherwise be due on the appreciation if the security were sold. For more information, you should contact your tax advisor.

SPLASHForward is a registered 501(c)(3) tax-exempt public charity, tax id 83-2629157

Template for Your Broker

Date

Your broker's name and address

Please accept this letter as authorization to give # shares shares of name of stock stock, stock symbol,

From account your account #, donor's name, to the following recipient:

DTC #0164

Account # 1855-3968

Account name: SPLASHForward

Name of Receiving Institution: Charles Schwab

Contact Name at Brokerage: Stephanie Fox

Contact Information: (206) 664-6813

Donor's signature

SPLASHForward is a registered 501(c)(3) tax-exempt public charity, tax id 83-2629157

SPLASHForward 721 4th Ave #417 Kirkland, WA 98033



splashforward.org

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