



Thank you for your interest in making a charitable gift to Project Hope Alliance (PHA) in the form of a Stock Transfer. **Please complete and return the second page of this form to receive your tax-acknowledgement.**

If you would like to make a donation of stock to PHA (tax ID#75-3099628:), please refer to page 3.

Gifts of stock will be recorded on the day the stock is received in our brokerage account, at the median market value on that day. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock.

...ending the cycle of homelessness, one child at a time...

1954 Placentia Avenue • Suite 202 • Costa Mesa, CA 92627 • T: 949.722.7863 • F: 949.722.7836

[www.ProjectHopeAlliance.org](http://www.ProjectHopeAlliance.org)



Please complete the information below to notify Project Hope Alliance (PHA) of your gift and help ensure it is processed accurately. Please email the completed information to [salbuquerque@projecthopealliance.org](mailto:salbuquerque@projecthopealliance.org).

**DONOR INFORMATION:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

**STOCK INFORMATION:**

Name: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Special Instructions: \_\_\_\_\_

**BROKER INFORMATION:**

Name of Broker: \_\_\_\_\_

Address of Broker: \_\_\_\_\_

Date of Transfer: \_\_\_\_\_

*Thank you for considering this important way to support Project Hope Alliance!*

Donor Signature: \_\_\_\_\_

Date Signed: \_\_\_\_\_

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### **Steps to Donating Stocks to PHA**

1. Visit “www.stockdonator.com”.
2. On the main page, enter in the following:
  - a. Stock Symbol
  - b. Quantity
  - c. Organization Name: **Project Hope Alliance**

#### **START YOUR DONATION HERE :**

Stock Symbol:\*

Quantity:\*

Organization:\*

\* Indicates required field.

**DONATE**

3. Click “DONATE”.
4. The website will generate the required form to process the transfer. Depending on the brokerage firm, some firms may require Medallion Signature<sup>1</sup> to validate the donation request.
5. If your firm does not require a Medallion Signature, the website will automatically transfer the request to the brokerage firm. You have now successfully completed the transaction!
6. If your firm does require a Medallion Signature, one of the following actions must be performed to complete the transaction:
  - a. Take the generated form to a financial institution.
  - b. Obtain a Medallion Signature.
  - c. Remit the signed form to your brokerage firm.
7. Once the transaction is completed, Stock Donator will provide a receipt for tax purposes.

<sup>1</sup> “Medallion Signature is a special signature guarantee for the transfer of securities. It is a guarantee by the transferring financial institution that the signature is genuine and the financial institution accepts liability for any forgery.”

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