



GREATER
TACOMA
COMMUNITY
FOUNDATION

STOCK TRANSFER INSTRUCTIONS

It is easy to make a gift of publicly traded securities to Greater Tacoma Community Foundation (GTCF). By transferring appreciated securities to GTCF you can avoid capital gains taxes and use the fair market value of the stock on the day of transfer as the contribution amount. GTCF handles all the administrative details.

To ensure a smooth process, please email accounting@gtcf.org when you are ready to initiate the transfer with the name of your broker, the name/amount of the securities and the name of the fund to which the gift should be credited.

Securities held by a broker may be delivered through the Depository Trust Company (DTC) to GTCF's brokerage account. Instructions should be given as follows:

Broker: Charles Schwab & Co.
P.O. Box 928605
El Paso, TX 7998-2605

DTC#: 0164

GTCF Account#: 4629-6123

Contact information:

Marinda Huber
Controller
Telephone: 253.345.4181
E-mail: accounting@gtcf.org or
mhuber@gtcf.org

Mo Mousa, CPA
Chief Financial Officer
Telephone: 253.345.4175
E-mail: accounting@gtcf.org or
mmousa@gtcf.org

After the stock is received, it is sold immediately, and the proceeds are deposited into the Community Foundation's account and credited to the correct fund.

GTCF sends the donor a letter which confirms the stock transfer including the number of shares. You can use this letter as documentation for your individual tax return.