

# GIFTS OF STOCK



Thank you for your interest in making a charitable gift to National Park Trust in the form of a stock transfer. Donating through stocks can be a convenient way to make your gift. There may also be tax advantages to donating stocks, consult your broker or tax advisor for more information.

**For stock held in brokerage accounts**, your broker can assist you in making a gift of stock via a direct transfer to the Park Trust. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock through your broker, please provide the following information to them:

**Brokerage House:** Charles Schwab

**Account Name:** National Park Trust (tax ID# 52-1691924)

**Account Number:** 3801-6879

**Telephone Number:** 1-800-435-4000

**DTC Number 0164 Code:** 40

**Reference:** Donor Name. If this is your first gift to the Park Trust, please provide your mailing address and phone number so that we can properly acknowledge your gift

**Please Note:** For mutual fund gifts, or for gifts of stock not held in a brokerage account, please contact Charles Schwab at the phone number listed above.

**If you are completing the transfer yourself**, please fill out and return the form on page to us for processing. Thank you!

# GIFT OF STOCK FORM



Please complete the information below to notify National Park Trust of your gift and help ensure it is processed accurately. Please email or fax your completed form to [dolores@parktrust.org](mailto:dolores@parktrust.org) or 301-279-7211.

## Donor & Securities Information:

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Name & Type of Securities (e.g.: DELL common stock)      Security Symbol      Number of Shares      Transfer Date

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Donor Name (Individual, Corporation, Foundation)

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Donor Street Address

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Donor City / State / Zip

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Broker Name

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Broker Company / City / State

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Broker Contact / Telephone Number

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Donor Telephone / Email Address (to be used only if a question arises in the donation process)

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Donor Signature      Date Signed      Donor Signature      Date Signed

NOTE - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering National Park Trust as the recipient of your charitable gift. Questions? Contact Dolores McDonagh at (301) 279-7275.