



STOCK DONATIONS

Thank you for your interest in supporting Project Self-Sufficiency through a donation of stock. To process your donation, please complete the following steps:

1. Contact Cheryl Brown to communicate your intent to donate and include the completed Donor Gift Letter for our records. Make sure to include the following:
 - a. **Transfer date**
 - b. **Number of shares**
 - c. **Share name and/or stock symbol**
 - d. **Donor information**
2. It is important that Project Self-Sufficiency receives notice from you that a donation of stock has been made, as we are not notified by Schwab. It also allows us to verify that the transaction was processed correctly, and ensures that each donor is receiving acknowledgement for the correct gift
3. In order to process your donation, your broker will need the following information:

Charles Schwab
DTC Number: 0164 code 40
Account Name: Project Self-Sufficiency of Northern Colorado
Account Number: 8829-1431

4. The value of your pledge amount is calculated as follows and according to the IRS rules:
 - a. The value of stocks and bonds is the fair market value (FMV) of a share or bond on the valuation date.
 - b. Ordinarily, the valuation date (date of a contribution) is the date that the transfer of the property takes place.
 - c. If there is an active market for the contributed stocks or bonds on a stock exchange, in an over-the-counter market, or elsewhere, the FMV of each share or bond is the average price between the highest and lowest quoted selling prices on the valuation date.
 - d. If a donor delivers, without any conditions, a properly endorsed stock certificate to a qualified organization or to an agent of the organization, the date of the contribution is the date of delivery. If the certificate is mailed and received through the regular mail, it is the date of mailing. If a donor delivers the certificate to a bank or broker acting as your agent or to the issuing corporation or its agent, for transfer into the name of the organization, the date of the contribution is the date the stock is transferred on the books of the corporation.
5. Once Project Self-Sufficiency has verified receipt of the stock, we will calculate your pledge amount. This may differ from the amount you calculate depending on when the transfer takes place. The amount we receive from the sale of stock does not affect your pledge amount.

Project Self-Sufficiency's tax ID number is 84-1206341. For questions, please contact: Cheryl Brown at 970-829-5161 or cheryl@bringthepower.org