



# Stock Gift Donation Instructions

FamilyWorks Tax ID: EIN #91-1757277

To make a gift of stock, please provide the following account information to your financial manager or representative:

**Pershing LLC**

**DTC Clearing #** 0443

**Brokerage Account #:** H22468948

**Account Name:** FamilyWorks

**Memo:** [Please indicate your **full name** in the Memo field of your stock transfer form so FamilyWorks can properly acknowledge your gift.]

If you're sending a stock, **please let us know!** Contact Danielle New at 206.647.1773 or [daniellen@familyworksseattle.org](mailto:daniellen@familyworksseattle.org) with your broker's name and phone number, the name and number of shares you are donating, and the fund to which you are contributing.

The tax advantage of a stock gift is that, under current tax laws, the full fair market value of stock and bonds may be deducted. The value of your gift is the value upon transfer to Pershing, LLC.

If you have further questions, contact Gavin Chinn at CUSO Financial Services, L.P. (at Verity Credit Union) at 206.361.5311.

We encourage you to speak with your financial advisor about how to manage your stock gifts.