



# STOCK TRANSFER INSTRUCTIONS

**Thank you for your gift of stock or securities to  
fuel Together Center's bold new vision!**

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- 1.) Direct your broker to donate shares of stock or mutual funds to Together Center using the following instructions:

Investment Firm: Fidelity Investments  
DTC #: 0226  
Account #: Z40036230  
Account Name: Together Center

Our Fidelity Financial Consultant in charge of transactions:  
Nicole Au-Yeung  
(425) 455-9104 x75251  
[NicoleAuyeung.team@fidelity.com](mailto:NicoleAuyeung.team@fidelity.com)

- 2.) **Critical step - notify Together Center of the pending transfer!**

Transfers occasionally arrive in our account without a donor name attached. Advanced notification of the transfer prevents unnecessary work tracing the funding source.

Notify:  
Anna Carroll, Campaign Manager  
(425) 558-9144  
[togetherstrong@togethercenter.org](mailto:togetherstrong@togethercenter.org)

- 3.) Together Center will notify you via email or phone once we have word the transfer has arrived in our account. A few days after that you will receive a written acknowledgement/tax receipt for the transfer.
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## An important note on valuing securities

Together Center follows the IRS guidelines for valuing securities. The value assigned is the mean share price on the day the stock arrives in our account. Note, this may or may not be the same day the transfer was executed by your brokerage.

Together Center is a registered 501(c)(3) organization and our tax ID is #91-1508791.

