



STOCK TRANSFER INSTRUCTIONS

**Thank you for your gift of stock or securities to
Together Center!**

- 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:
Kelvin An
(425) 455-9104 x77754
KelvinAn.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:
Jared Stewart, External Engagement Manager
(425) 558-9144
Engagement@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.

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.

