Stock Gift Instructions

Thank you for your interest in supporting **Special Hope Network**! Giving a gift of appreciated stock is a powerful way to further our mission while maximizing your personal tax benefits.

To ensure your gift is received and acknowledged correctly, please follow the instructions below to initiate a transfer from your brokerage account to our corporate brokerage account at Charles Schwab.

Step 1: Provide These Details to Your Broker

Instruct your broker or financial advisor to initiate a **DTC Transfer** using the following delivery instructions. Please ensure they include your name in the transfer memo fields if possible.

- **Receiving Firm:** Charles Schwab & Co., Inc.
- **DTC Number:** 0164 (Code 40)
- **Account Name:** Special Hope Network (Schwab One® Corporate Account)
- **Account Number:** 6820-8487

Step 2: Notify Us of Your Gift (Critical)

When stocks are transferred electronically, brokerage firms often do not include the donor's name or contact information with the incoming transfer. To ensure we can track your donation and issue an official tax acknowledgment letter, please notify us before or immediately after making the transfer by completing this form or sending an email.

Please send your notification to:

- **Contact Person:** Erica Knights, US Director of Operations
- **Email Address:** info@specialhopenetwork.org
- **Phone Number:** (425) 224-3015

Donor Notification Details

- **Donor Name(s): _____**
- **Mailing Address: _____**
- **Phone / Email: _____**
- **Name of Stock / Ticker Symbol: _____**
- **Number of Shares: _____**
- **Anticipated Date of Transfer: _____**
- **Project Designation (if applicable): _____**

Important Tax Information for Donors

- **Valuation:** For your tax records, the IRS values a stock donation based on the fair market value (the average of the high and low trading prices) on the day the stock officially enters the charity's account.
- **Tax Receipting: Special Hope Network** is a registered 501(c)(3) organization. We will provide an official written acknowledgment confirming the ticker symbol and the number of shares received once the transfer is finalized. Per IRS guidelines, this receipt will not state a dollar value, as determining the final deductible value remains the responsibility of the taxpayer.

Please consult your tax professional or financial advisor to discuss the specific tax implications of your charitable stock gift.