



## HOW TO GIVE STOCK GIFTS TO DESERT STREAM MINISTRIES

Giving stocks can help you and Desert Stream Ministries at the same time!

### **1. WHAT YOU CAN GIVE:**

1. Any stock with a stock symbol
2. Any ETF with a stock symbol
3. Any shares of a mutual fund with a stock symbol (whole shares only)

### **2. BROKERAGE TYPE:**

1. If you have a full-service broker, notify them of your intent to transfer stock to Desert Stream Ministries, indicating the stock and the number of shares you would like to give.
2. If you have a self-service brokerage other than Schwab Charitable, locate the form used for transferring stock, often entitled "[Transfer of Assets](#)" form. Call your brokerage's customer service if needed, as requirements vary from one brokerage to another.
3. If you are a Schwab client and have an existing Schwab Charitable account:
  1. You can make contributions to your donor advised fund account directly from your Schwab account.
  2. Alternatively, you can download the "[Contribute to Your Donor Advised Fund Account](#)" form. Complete and sign this form before mailing it to us or sending us a scanned copy.
  3. Schwab Charitable has made available "[Delivery Instructions](#)" for download. This contains instructions for sending documents to Schwab Charitable, wire transfers, EFTs, mailed checks and physical security certificates, DTC-eligible securities, and Fed-book entry securities.
  4. If you need any assistance with filling out the forms you can contact your advisor, or call or email us - our information is below.

### **3. INSTRUCTIONS FOR THE BROKER OR FOR COMPLETING THE FORM YOURSELF:**

1. Do not sell the stock. This is a gift transfer to a charity.
2. Fax number for Schwab Charitable: 877-535-3852
3. DTC#: 0164



4. Desert Stream Ministries' Schwab Charitable Account Number: 7347-1196
5. Desert Stream Ministries' Tax-Exempt ID Number: 95-3889820
6. Desert Stream Ministries Contact: (816) 767-1730 ext. 807 or [accounting@desertstream.org](mailto:accounting@desertstream.org)
7. Fax the completed form to Schwab Charitable 877-535-3852
8. If you have any additional questions, you may call us at the number mentioned above or Schwab Charitable customer service: 1-800-746-6216

#### **4. NOTIFY DESERT STREAM MINISTRIES**

1. Please inform us of the gift so we can properly receive and acknowledge your donation.
  1. Please email [accounting@desertstream.org](mailto:accounting@desertstream.org) the date of the transfer, the stock symbol, and the number of shares.
  2. Please include your best contact number as well as your mailing address.

#### **5. WHAT HAPPENS NEXT?**

1. We will ensure your stock gift gets to Desert Stream Ministries' brokerage account.
2. Whichever way you choose to contribute, you will receive a notification from Schwab Charitable about your contribution and a receipt that can be used for tax purposes.

#### **6. ADDITIONAL QUESTIONS?**

Contact Beni in our accounting department at 816-767-1730 ext. 807 or [accounting@desertstream.org](mailto:accounting@desertstream.org).



## Desert Stream Ministries Stock Donation Form

To: _____	(My Stock Broker)
At: _____	(My Brokerage Firm)
_____	(My Account #)
_____	(Name of Stock) Stock Contribution
_____	Number of Shares to be Donated
\$ _____	Estimated Amount of Donation
<u>Desert Stream Ministries</u>	Name of Charity
<u>DTC Clearing 0164, Code 40</u>	Depository Trust Company # at Charity
<u>Schwab Charitable</u>	Broker
<u>7347 - 1196</u>	Account # at Charity
<b>Contact Information at Charity:</b>	
<u>Beni Nobrega, Accounting</u>	Name
<u>816.767.1730, ext. 807</u>	Phone number
<u>accounting@desertstream.org</u>	E-mail address
<b>Contact Information at Charity's Brokerage:</b>	
<u>1-800-746-6216</u>	Phone number – Donor Services
<u>1-877-535-3852</u>	Fax number
<u>Charles Schwab &amp; Co., Inc.</u>	Mailing address
<u>Orlando Operations Center</u>	
<u>P.O. Box 628291</u>	
<u>Orlando, FL 32862-8291</u>	
_____ Authorized by:	_____ Date