



Stock Giving Instructions

Donating stocks to the Caring Community Foundation is quick and easy. We work closely with Financial Resource Management, Inc. to receive and sell your transferred securities.

Please provide the following delivery instructions to your broker:

Clearing Firm: Pershing
Fund: Caring Community Foundation, Inc.
Account #: Q63042792
DTC #: 0443

IMPORTANT! Please note that the stock arrives without identification, so please notify alert Maria Hernandez at mhernandez@caringcommunityfoundation.org of your transfer.

Please provide the following information to share with Financial Resource Management:

Company of stock being transferred (and symbol)
Type of stock (common, preferred, etc.)
Number of shares
Approximate date of transfer

Once your stock gift is processed, a tax receipt will be mailed out stating the name of the stock, the number of shares, and the date it was received by Caring Community Foundation, and the high and low values that day. Your tax advisor should determine the tax-deductibility of the gift.

If you have other questions or need additional information, please contact Maria Hernandez at 919-451-7597 or at mhernandez@caringcommunityfoundation.org.

Thank you so much for your support of the Caring Community Foundation!

Caring Community Foundation is a 501(c)(3) nonprofit corporation. Federal Tax ID #20-0036976
Mailing Address: P.O. Box 1364 | Cary, NC 27512 | www.caringcommunityfoundation.org

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