

## STOCK DONATION INSTRUCTIONS

To donate stock to Forward Steps, please follow the instructions below. Forward Steps is a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code, tax ID # 20-5092412. Please consult your tax advisor to discuss the gift you are considering and to determine the tax advantages for you.

---

### Step 1.

Include the following details in your request to your broker:

- Expected date of transfer of shares
- Number of shares
- Name of stock
- Your mailing address
- Your phone number
- Name of charitable agency receiving shares: Forward Steps Foundation
- Agency contact information: Jennifer Waaler, Executive Director

### Step 2.

Provide your broker with Forward Steps' brokerage account information:

**Receiving Firm:** Merrill Lynch

**DTC #:** 8862

**Receiving account name:** Forward Steps Foundation

**Receiving account number:** 429-02401

**Contact information at Merrill Lynch:** Meagan McCormack 303.938.3955

Thank you for considering a gift of stock for Forward Steps! For more information, please contact:

Jennifer Waaler

303-404-9969

[jennifer@forwardsteps.org](mailto:jennifer@forwardsteps.org)