

Interfaith Caregivers of Polk County, Inc.
Electronic Transfer of Stock/Bonds/Securities/Mutual Funds

Thanks you for your recent inquiry about donating stock to Interfaith Caregivers. Your donation to our program will share the “Gift of Independence” with many elderly and adults living with disabilities by providing rides, visits, chores and more.

The gift of appreciated stocks that have increased in value (and which the donor has owned for more than a year) provides greater tax benefits to the donor than giving money. Not only can the donor deduct the full market value of the securities, but also can avoid paying capital gains tax on the appreciation.

Making a gift of stock to our program is a relatively simple procedure. Your broker will need the following information to complete the electronic transfer:

Broker: **Invest Financial/Pershing**
Account Representative: **Matt Casey, 715-246-2268 x3102**
Deliver Trust Company (DTC) Number: **0443**
Interfaith Caregivers Account Number: **5ZV-067011**
Beneficiary: **Interfaith Caregivers of Polk County, Inc.** EIN: **39-1837906**

The donor’s name does not always appear on the stock transfer information, so please ask your broker to add your name in the subject line of the transfer so that we can match it with your gift record. After you instruct your broker to make the stock transfer, we ask that you call or write us to let us know of your gift. Please share the following:

- Name of stock transferred
- Number of stocks
- Brokerage firm stock transferred from
- Approximate date of transfer



*A Neighbor's
Independence
Depends On You*

**FAITH
IN ACTION**

For additional information, please contact:

Karen Krupa, Program Director
Interfaith Caregivers of Polk County, Inc.
PO Box 426 Balsam Lake WI 54810-0426
715-485-9500
interfaithcare@centurytel.net