



Stock Giving Instructions

Donating stocks to 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 Bradford Brady at bbrady@ccfnc.org of your transfer.

Please provide the following information with Financial Resource Management:

- **Company and symbol of stock**
- **Type of stock (common, preferred, etc.)**
- **Number of shares**
- **Approx. 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 Bradford Brady at 919-880-4762 or bbrady@ccfnc.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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