



Stock Donation Form

Ponderosa Center can accept gifts of appreciated stock – allowing you to potentially save on capital gains taxes while making a meaningful contribution to the center. Please consult with your financial advisor for more information about these benefits.

To make a gift of stock to the Ponderosa Center, follow these procedures:

1. Contact your stockbroker or financial adviser. A stockbroker can make a direct electronic transfer of your stock certificates to the Ponderosa Center account with the following information:

FBO Account Name: Ponderosa Center Inc.

Purpose: Please indicate purpose, ex. Operations or Capital Campaign

Ponderosa Center's EIN: 81-5160126

Financial Advisor: Edward Jones

Account #: 202-20390-1-6

Account Type: Select - LLC

Branch Number: 62022

Advisor Number: 523976

Edward Jones DTC#: 0057

Address: Edward Jones
616 N. 3rd Street, Suite 105
McCall, ID 83638

* Contact Dessa Smith with Edward Jones at 208-634-5855 with any questions

2. Important information for gifts of stock:

All securities must be transferred into Ponderosa Center's name prior to being sold; otherwise, the donor will be responsible for paying capital gains tax on the appreciated asset(s). You or your Advisor must notify the Ponderosa Center and Edward Jones when you are making a transfer. Due to security regulations, there are no individual names associated with an account on a stock gift, therefore it is essential that you notify us so we may properly thank and credit you for your generous donation.

Donor Name(s): _____

Stock or Security Name (Include symbol): _____

Number of Shares: _____ **Planned Date of Gift:** _____

Broker's Name: _____ **Broker's Phone #:** _____

For more information on how to donate stock, please contact Hayley Johnson at admin@ponderosacenter.org or (208) 271-1185.