



## Instructions for gifting securities to 10/40 Connections

Donating securities that have appreciated in value to a charity such as 10/40 Connections can be an extremely tax-effective way of giving. Usually, the donor will be able to take the full market value of the securities on the date they are transferred as an itemized deduction, without incurring any tax on the gain represented by the difference between his or her cost and the current market value.

How you can make a gift of securities depends on where those securities are held. The following instructions are intended to make this process as easy as possible.

### For securities being held by a brokerage firm:

Tell your broker that you wish to donate the securities to 10/40 Connections. Instruct your broker to transfer the securities to:

- Charles Schwab & Co. Inc.
- FBO (for the benefit of): 10/40 Connections, Inc.
- Account number: 52552414
- DTC routing number: 0164 code 40

\*For mutual shares, please see the following instruction page.

**IMPORTANT:** When you have given these instructions for transfer, please notify Jinna Neal at [jinna@1040connections.org](mailto:jinna@1040connections.org) and provide the following:

- Number of Shares you are giving
- Company in which Stock is held
- Date of expected transaction (i.e. 40 shares in Coca-Cola transferred October 18, 2012)

This will allow us to fully and accurately acknowledge your gift with a tax-deductible receipt.

**For mutual fund shares held directly in an account with the mutual fund group:**

Ordinarily, you will have to provide the mutual fund written instructions to make the transfer. The signature (or signatures) of the account owner(s) on these instructions will have to be guaranteed by a bank or brokerage firm. Although requirements may vary among mutual fund sponsors, instructions along the following lines should work:

\_\_\_\_\_  
(date)

I am (we are) the registered owner(s) of account number \_\_\_\_\_, holding shares  
of \_\_\_\_\_. I (we) hereby instruct you to transfer \_\_\_\_\_ of the  
(name of fund) (number of shares)

fund to an account in the following name:

10/40 Connections  
2120 Northgate Park Lane, #400  
Chattanooga, TN 37415  
423-468-4871

By directing you to make this transfer, I intend to make a charitable gift of these shares to 10/40 Connections (10/40). If you need further information to complete establishing an account for 10/40, please contact them directly.

Very truly yours,

\_\_\_\_\_  
(signature of registered owner)

\_\_\_\_\_  
(joint owner, if any)

\_\_\_\_\_  
(street address)

\_\_\_\_\_  
(city and state)

Signature(s) guaranteed: \_\_\_\_\_

**IMPORTANT:** When you have given these instructions for mutual fund transfer, please email Jinna Neal at [jinna@1040connections.org](mailto:jinna@1040connections.org) and provide the following:

- Number of Shares you are giving
- Company in which Stock is held
- Date of expected transaction (i.e. 40 shares in Coca-Cola transferred December 15, 2012)

This will allow us to fully and accurately acknowledge your gift with a tax-deductible receipt.