



HOW TO TRANSFER GIFTS OF STOCK IN THREE EASY STEPS

The Hastings Community Foundation has an account with Charles Schwab that receives all stocks for immediate liquidation. This account is served by Oakeson Steiner Wealth & Retirement. If your stock is held in certificate form, please contact Oakeson Steiner at 402-461-3000 to have them assist you in the handling of your gift. If your stock is held in a brokerage account at another financial institution, you need to authorize your financial institution to transfer that stock(s) to our Schwab account. Here is how:

1. Your financial institution will not transfer stock without your authorization. They may require a specific form to be completed, or they may allow you to draft a letter using the template below:

(Date)

Dear xxxxx *Brokerage House*:

Please transfer ___ shares of my _____ stock held in my account # _____ with your firm, to Charles Schwab via DTC per the following information.

DTC Clearing #: **0164**

For further credit to Charles Schwab Account #: **42147266**

For further credit to Charles Schwab Account Name: **Hastings Community Foundation**

Thank you.

(Your signature)

Your printed name

2. Contact your financial institution to see if they will accept an electronic copy of your request form/letter or if it is necessary to mail or complete the request online. Whichever method you use to make the request, you will want to ask for confirmation once it is received.
3. Contact the Hastings Community Foundation at **402-462-5152** to let them know that your stock is being transferred. We are unable to process the stock gift until we identify who is making the donation.

The Hastings Community Foundation will be notified by Oakeson Steiner when the stock has been transferred. The Hastings Community Foundation will authorize Schwab to sell the stock(s) immediately. The proceeds from the sale, minus the commission, will be applied to the fund you've requested. You will receive a gift acknowledgment from the Hastings Community Foundation confirming this stock gift.