

INFORMATION FOR GIFTS OF SECURITIES

The Salvation Army – Kansas & Western Missouri Division (Stocks, Bonds, Mutual Funds)



1. Please send all inquiries and information for processing and acknowledgement of securities gifts to:

The Salvation Army, Gift Planning Office
Attention: Vanessa Peterson
3637 Broadway
Kansas City, MO 64111

Direct Line: (816) 968-0325
Toll-Free: 1-800-336-4547, extension 325
Fax: (816) 968-0462
E-mail: vanessa_peterson@usc.salvationarmy.org

2. Broker:
The Bank of New York Mellon
500 Grant St., 4th Floor
Pittsburgh, PA 15258

Account number: N7M001772
Direct transfer (DTC) number: 0443

Contact: Jorja Watts - 412-234-0439
Jorja.watts@bnymellon.com

3. The Salvation Army Tax ID #: 36-2167910.
4. The legal name is **THE SALVATION ARMY**.
5. We are a 501(c)(3) non-profit organization incorporated in the State of Illinois. All gifts are used for general operations in the area of origin unless designated otherwise.
6. Please provide all information about the securities gift to the Gift Planning Office to help us properly credit the gift and send out acknowledgment to the donor.

Example:

- a) Donor name, address, and phone number
- b) Any designation or restriction of the gift
- c) If broker is involved, the name, address, phone number and brokerage
- d) Securities description and identification

Contact us with any questions. Thank you for your support! An official gift receipt will be sent once we know who made the gift.

NOTE: For direct transfer gifts, the gift date is the date on which the gift is received into our account. Please plan accordingly and allow enough time for the gift's receipt.

PLEASE SEE OTHER SIDE FOR DETAILS:



HOW TO MAKE A STOCK OR MUTUAL FUND GIFT TO THE SALVATION ARMY

1. **Contact us first** and let us know you will be making a gift: what broker, what company or fund, how many shares (or \$ amount), and if you want the gift designated.
2. **If your shares are in “street name” with a broker**, provide the transfer instructions on the other side of this sheet to the broker and instruct that the shares be transferred to our account. If we haven't yet been notified about the gift, you or your broker should contact us with the details once the shares are transferred.

NOTE: For “broker to broker” gifts, the gift date is the date on which the shares are received into our account. Please plan accordingly and allow enough time for the gift's completion.

3. **If your shares are in certificate form and registered to you**, mail the following (or contact us to arrange for pickup):
 - √ The *unendorsed* certificate
 - √ A stock power form, with signatures of all registered owners on the certificate, with Medallion Signature Guarantee from a bank or brokerage
 - √ Letter of intent/any designation for the gift to The Salvation Army, signed by all registered owners

Your gift will be complete on either the date of the postmark, or the date given to us in person.

4. **If your shares are in certificate form and already registered to The Salvation Army**, mail (or contact us to arrange for pickup) the certificate along with a letter notifying us of your gift and any designation.

Your gift date is the date printed on the certificate.

PLEASE CONTACT US WITH YOUR QUESTIONS, INFORMATION, OR TO ARRANGE FOR US TO PICK UP YOUR GIFT:

The Salvation Army, Gift Planning Office
3637 Broadway
Kansas City, MO 64111

Phone: 816-968-0325 or 800-336-4547, ext. 325
Fax: 816-968-0462
E-mail: Vanessa_peterson@usc.salvationarmy.org

If you make a gift of securities, please be sure to contact us so we know we can properly designate and record your gift. We will send you a letter of acknowledgement for your tax records.