

Stock Transfer Form



Thank you for supporting Financial Beginnings! Your generosity advances our mission to empower youth and adults to take control of their financial futures. To make a stock donation, please complete the form below. Thank you!

STEP 1: Provide the following information to your broker:

Recipient: Financial Beginnings
Tax ID: 20-3530960

Brokerage: Charles Schwab & Co., Inc.
Contact Schwab: 800-435-4000

Account #: 1577-7808
DTC #: 0164

STEP 2: Complete the form below to enable Financial Beginnings to match incoming securities to your donation record. If you want to receive a tax receipt, please include your name, contact info and security detail information when you submit your transfer.

Donor Name _____

Address _____

Phone _____ Email _____

Employer _____

Brokerage Firm Name _____

Broker Name _____ Broker Phone _____

Name of Security/Symbol _____

Number of Shares _____ Est. Value _____

Special Instructions _____

STEP 3: Submit this form to Financial Beginnings.

Contact: Ronecca Norvell, CEO – 503.348.7858
Via email: ronecca.norvell@financialbeginnings.org
Via mail: Financial Beginnings
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