



Making A Securities Donation

Applies to Non-Retirement Accounts Only

Thank you for making a securities donation to Opportunity Works, Inc. Like a cash donation, 100% of your gift directly supports our valuable work and important mission; **Empowering People. Changing Lives.**

We strive to make the gift process as easy as possible for you.

Step 1: Help us prepare our broker to receive your gift with this basic information. You can submit the following information to bizdev@opportunityworks.org or by calling our office and providing your confidential information directly to our development staff via phone or by emailing Kathleen.pruett@opportunityworks.org

- ❖ Your First/Last Name
- ❖ Your email address and phone number
- ❖ Name, symbol, and type (stock, bond, mutual fund) of the security you are gifting
- ❖ Number of shares and current value per share
- ❖ Name, phone and email for your broker

Step 2: Contact your Transfer Agent/Broker to begin the transfer of your securities. To facilitate this you will need to provide a letter of instruction that includes:

Please transfer ##### share of _____ stock to the brokerage account for Opportunity Works, as follows:
National Financial Services
Clearing/DTC # 0226
Brokerage Account: B3S545159 Opportunity Works, Inc.

Step 3: Your agent will work with our partners at Insight Financial Horizons to complete the securities transfer. Opportunity Works will furnish you with a letter after receipt for documentation and tax purposes.

Do not hesitate to call our office at 978-462-6144 ext. 234 for questions.

Sincerely,

Jane Harris Fale
Executive Director