



HOW TO DONATE APPRECIATED SECURITIES

- 1) Contact Fulcrum Foundation's Advancement Director Amy Hall at 206.226.5679 to notify us of your intended gift.
- 2) Contact your broker to inform them of your request. They will be able to help direct you on the paperwork that you need to present them to release your stock.
- 3) Email a copy of this form to Amy Hall at amy.hall@fulcrumfoundation.org

Donor's Name _____ Phone _____ Fax _____
Address _____ City _____ State _____ Zip _____

Donating:	# of Shares	Company Name	Approx. Value (if known)
_____	_____	_____	_____

Donor's Broker's Firm _____

Donor's Account Executive _____ Phone _____

Fulcrum has an account with the following firm and broker. This account is **separate** from the Archdiocese of Seattle accounts.

Broker:

- D.A. DAVIDSON (#33369951, DTC 0361)
Account Executive: Abraham Otoupal
(425) 881-6665
PO Box 748
Redmond, WA 98073

The following is information you should give your broker regarding our accounts:

All Accounts are under the name of: Fulcrum Foundation and Fulcrum Foundation's Tax Exempt ID# is 16-1616262.