

How to Give Stock or Mutual funds to The Navigators

How to Give Stock to The Navigators

Giving gifts of stock is relatively easy. There are two major things that you, as a donor, need to do.

- **Contact your broker to initiate the sale.**
- **Contact the Non-Cash Gift Coordinator at The Navigators to inform them of your gift.**

Contacting your Broker

There is certain information that your broker will need in order to make an electronic transfer of stock from your account to The Navigator account. By filling out the attached form: “**Letter of Instruction for Stock Transfer**”, you will have the information that you need to forward to your broker. Complete this form and forward the information to your broker. You do not need to send this information to The Navigators.

Contacting the Non-Cash Gift Coordinator at The Navigators

It is **VERY** important to contact the Non-Cash Gift Coordinator at The Navigators when you instruct your broker to transfer stock to The Navigator account. Information that you provide to your broker is **NOT** passed on to The Navigators. Therefore, if you don't contact us, we have no way of knowing who gave the gift, or how you would like to see the gift used. Although we make every effort to identify the source of stock gifts, there are some that we are unable to identify each year. If we are unable to identify the source of the gift, we are unable to supply an acknowledgement of the receipt of the gift for tax purposes.

Please use the attached form: “**Notice of Transfer of Stock**” to supply the required information. Information on how to return the form to The Navigators is provided at the bottom of the form. You do not need to send this information to your broker.

What happens next

Once the stock is transferred into The Navigator account, we make every effort to sell the stock quickly. This enables us to turn your gift into cash that can then be distributed into Navigator project accounts. It is not our intent or desire to hold onto stocks in order to try to “play the market” or increase gains. We take the stewardship of your gifts very seriously, and strive to make timely and thoughtful decisions regarding these gifts.

Our broker sells the stock on behalf of The Navigators. Our broker then issues a check made out to The Navigators for the net proceeds of your gift. When that check is received at The Navigators, we process it as quickly as possible, distribute the proceeds within The Navigator organization - taking into account your wishes, and prepare your acknowledgement letter.

If you have not received your acknowledgement letter within three weeks of the time that the transfer was made, please contact the Non-Cash Gift Coordinator.

Donating Shares of Stock by Stock Certificate

If you are donating shares of stock where you hold the Stock Certificate in your possession, please contact the Non-Cash Gift Coordinator before signing the certificate. Stock Certificates can vary and it is best to discuss what is required before taking any action.

How to Give Mutual Funds to The Navigators

If you are giving a gift of shares of a Mutual Fund, please contact The Navigators Non-Cash Gift Coordinator to discuss how to proceed with the transfer. Unlike stocks, each mutual fund company may have its own unique procedures. We may need to contact your broker or mutual fund company to determine the most efficient way to complete the transfer. For this reason, donations of mutual fund shares may be delayed for some time while The Navigators set up or re-open accounts with the various mutual fund companies.

There are several ways to contact the Non-Cash Gift Coordinator.

By mail:

The Navigators
Attn: Non-Cash Gift Coordinator
PO Box 6000
Colorado Springs CO 80934-6000

By phone: 800-530-8282 ext. 2525

By email: stockgifts@navigators.org

By fax: 719-594-2314



Letter of Instruction for Stock Transfer

(To be sent to your stock broker)

Please transfer _____ shares of _____ stock to The Navigators account at Wells Fargo Advisors. I am aware that I am relinquishing the stated number of shares of the stated stock to The Navigators.

My account number is: _____

The Navigators account number with **Wells Fargo Advisors is 3913 8216**
The DTC number is: **0141**

Thank you,

_____ Date: _____
_____ please print name

Additional Information:

Brokerage: **Wells Fargo Advisors**
Broker: Susie Kaufman
Phone: 719 636 8000

The Navigators
Contact name: Karen Harper
title: Non-Cash Gift Coordinator
phone: 800-530-8282 ext 2525
email: stockgifts@navigators.org



Notice of Transfer of Stock

(To be sent to The Navigators)

I recently instructed that shares of stock be transferred into The Navigators account.

The name of the stock was: _____

The number of shares transferred was: _____

The approximate date of the transfer was: _____

My name is: _____ (please print)

Please send my acknowledgment to the following address:

Street _____

City _____ State _____ Zip _____

I would like for my gift to benefit the following ministries or projects:

Name _____ or project number _____

Name _____ or project number _____

Name _____ or project number _____

Attach additional pages as necessary

Send information to:

The Navigators
Attn: Non-Cash Gift Coordinator
PO Box 6000
Colorado Springs CO 80934-6000

Or e-mail: stockgifts@navigators.org

Or phone: 800-530-8282 ext. 2525

Or faxed: 719-594-2314