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 things that you, as a donor, need to do.

- Contact your broker to initiate the transfer of your gift. Please send your broker page 2.
- You will need to inform us of your gift by mailing in or scanning and emailing Page 3.
Letter of Instruction for Stock or Mutual Funds Transfer
(To be sent to your stock broker)

Please transfer ________ shares of __________________________ securities to The
Navigators account at Charles Schwab. I am aware that I am relinquishing
the stated number of shares of the stated securities to The Navigators.

My account number is: ____________________________

The Navigators account number with Charles Schwab is

DTC number 0164, code 40
Account number 8011-7667

Thank you,

_________________________________________ Date: ______________
_________________________________________ please print name

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Additional Information:

Advisor: Innovest Portfolio Solutions
Contact: Nancy Swanson
Phone: 303-694-1900 Ext. 319

The Navigators
Email: stockgifts@navigators.org
Notice of Transfer of Stock or Mutual Funds
(To be sent to The Navigators)

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

The name of the security 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.

Scan and email information to: stockgifts@navigators.org

OR

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

Phone:
866-568-7827