

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

Additional Information:

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

Email: **The Navigators**
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