

The Gift of Stock

To help you facilitate a gift of stock to Women's Economic Ventures (WEV), please use these instructions:

Step 1: Initiate the Transfer

Contact your broker to initiate the transfer.

Step 2: Notification of Donor Intent

For Women's Economic Ventures to properly acknowledge a gift of stock, upon receipt, it is important that we are notified (call Lauren Lafferty at (805) 908-0093 or email llafferty@wevonline.org) by the donor or transferring broker of the following:

Donor name and complete address

Name and number of securities transferred

Date of transfer

Step 3: Securities Delivered Electronically DTC #: 0226

Firm: Fidelity Investments

Account #: Z72-174360

Women's Economic Ventures

Tax ID #: 95-3674624

If you have any questions about this process, please contact Lauren Lafferty, Associate Director of Development, at (805) 908-0093 or email llafferty@wevonline.org.

This information is not intended as legal, tax or investment advice. For such advice, please consult an attorney tax professional or investment professional.