



Angels & Sparrows Stock Donation Instructions

Thank you for choosing to support Angels & Sparrows through a stock donation. Your generosity helps provide meals, educational support, and opportunities for families across North Mecklenburg as they work toward greater financial independence.

To ensure your gift is received, properly acknowledged, and credited according to your wishes, please follow the instructions below.

Step 1: Contact Your Broker

Please provide the information below to your broker or financial advisor when initiating the transfer.

Receiving Firm	Charles Schwab & Co., Inc.
DTC Number	0164
Account Name	Angels & Sparrows
Account Number	3697-9140
Tax ID (EIN)	94-1737782

If additional information is required, please contact Cindy Deutsch, CFRE Development Director, prior to initiating the gift. Email: Cindy@angelsandsparrows.org

Step 2: Complete the Stock Donation Notification Form

Complete the form on Page 2 and return it to Cindy@angelsandsparrows.org before or immediately after initiating your transfer.

We Request This Information To:

- Properly acknowledge your gift for tax purposes
- Ensure your donation is credited accurately
- Comply with audit and financial reporting requirements
- Confirm any designation or special purpose associated with your gift



Stock Donation Notification Form

Donor Name(s): _____

Email Address: _____

Phone Number: _____

Brokerage Firm: _____

Date Transfer Was Initiated: _____

Expected Transfer Date (if known): _____

Stock / Mutual Fund Name: _____

Ticker Symbol: _____

Number of Shares Donated: _____

Gift Designation (optional):

Greatest Need

Community Table

Pathway Program

Other: _____

Please note: For tax purposes, Angels & Sparrows will acknowledge the date the securities were received and the number of shares transferred but will not assign a dollar value to the gift. Please consult your tax advisor regarding the valuation of your donation.