

Thank you for partnering with CFR by contributing to your Giving Fund. We have special instructions for donating stock. You will need to transfer the equity shares directly from your personal account to our brokerage account at Christian Financial Resources, which is held at Charles Schwab.

## Account Details:

### Christian Financial Resources

Brokerage firm: Charles Schwab

Brokerage DTC number: 0164

Account number: 1390-6094

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You will need to provide this information to your broker to complete the transfer. Details regarding the Fair Market Value (FMV) as of the trade date should be provided by your broker.

**Once the transfer has been initiated, please email a detailed confirmation to us, including the name of the Giving Fund to be contributed to, stock ticker, number of shares, and estimated value at [stewardship@cfrministry.org](mailto:stewardship@cfrministry.org).**

If you do not send this information to us, the liquidated amount will be placed in a holding account. After the stock transfer is completed, the shares will be liquidated and placed into your Giving Fund for grant distribution purposes.

At this time, we will notify you and send a confirmation letter of your donation. Thank you so much for your generosity, which helps fund ministry and change lives.

## Charles Schwab

- [Complete](#), sign, and fax to 1-877-824-3726, Attention: Outgoing Transfers
- Clients of investment advisors, give this form to the advisor.
- This form can also be uploaded to the message center if you're logged into the Schwab account.

## Fidelity

- [Complete](#), sign, and mail to:

Regular Mail	Overnight Mail
Fidelity Investments Attn: TOA Deliveries PO Box 770001 Cincinnati, OH 45277-0033	Fidelity Investments Attn: TOA Deliveries 100 Crosby Parkway KC1B Covington, KY 41015-4325

- If over \$18,000 gifted, a medallion signature guarantee is required.

## E-Trade

- Fill out [form](#) online and submit through Docusign
- Fill out [form](#) and fax to 1-866-650-0003
- Easiest way with computer access is to go through this link and fill out this info:  
[Log on to E\\*TRADE](#); find the “transfers” tab in the top right menu and select “other services” and then “make a charitable donation.”

## Merrill

- [Complete](#), sign, and mail/fax to:

Regular Mail	Overnight Mail	Fax to
Merrill Document Processing PO Box 31024 Tampa, FL 33631-3024	Merrill Document Processing FL1-908 -01-36 4909 Savarese Circle Tampa, FL 33634	1-877-229-7160

- If over \$50,000 gifted, a medallion signature guarantee is required.

## Vanguard

- Log in, click on Forms > add or remove owners, inherit accounts, gift shares
- Click “gift assets to individual/organization” > click “other financial institutions” > fill in DTC: 0164
- Submit online form after filling out remaining information