

How to make a Homeless Contribution Tax Credit (HCTC) qualifying gift of stock:

1. Make a request to your stockbroker/holder to transfer stocks directly to SRM's brokerage account. Stock gifts valued at \$5,001 and above qualify if transferred directly to SRM.

UMB Financial Services

Clearing Number – DTC0226

Account Name – The Springs Rescue Mission

Account Number – H8P-043370

2. So that we may properly acknowledge your gift, please contact Julie Divine (julied@springsrescuemission.org, 719-314-2370) to let us know the details of the transfer (date, # of shares, name of stock), the desire for the donation to be for HCTC, and the last four digits of your social security number (required for the tax certificate).
3. Once the stock is transferred, SRM will contact you to confirm receipt of the funds, will issue a receipt for the donation, and will complete the HCTC credit process on your behalf through the state portal.
4. You'll receive an email link directly from the State of Colorado's Department of Local Affairs (DOLA) with instructions to download your HCTC tax credit certificate.
5. On the same page where you download your tax certificate, there will be a request to upload documentation for any gift over \$5,000. For a gift of stock, the documentation should be a third-party valuation of the gift at the time of transfer. This should come from your brokerage account.

Thank you for your generous partnership! It makes such a difference!

NOTE: If making a donation via mutual funds or exchange traded funds, please contact Julie Divine directly at julied@springsrescuemission.org or (719) 314-2370.