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abode.org

Information for Transfer of Financial Assets

Abode maintains an investment account with Progressive Asset Management. This account can be used to facilitate the transfer of various financial assets (equities, bonds, etc.). To initiate such a transfer, the donor will need the following information:

Brokerage:	National Financial Services
Deliver to:	DTCC #0226
Account Number:	0X2-104477
Account Name:	Abode Services

If such a contribution is being considered or forthcoming, we would ask that you:

- 1) Provide Abode with a letter of intent or a copy of your broker instructions; or
- 2) Notify Donor Support of your client's wishes at (510) 358-3236 or donors@abode.org.

This will allow us to identify the benefactor and to send a timely acknowledgement letter. The value of the gift will be based upon the average of the high and low price of the security on the day the gift is received in the Abode account.

If your client's security is held in certificate form, you can send the certificate directly to Progressive Asset Management with a stock power, which needs to be guaranteed (not merely notarized) at your client's bank or brokerage. The certificate and stock power should be mailed in separate envelopes via certified mail or FedEx to:

Tim Rich, Financial Advisor
1814 Franklin Street, Suite 503
Oakland, CA 94612

Please do not hesitate to contact Donor Support at (510) 358-3236 or donors@abode.org if you have any questions. We thank you and your client for considering Abode for your generous donation.

Our federal tax identification number is 94-3087060. This organization is a 501c(3) tax-exempt organization, IRS Section 170(b) (2) (iii) for both federal and state tax purposes.

Sustainable Solutions to Homelessness