



STOCK DONATION INSTRUCTIONS

To donate stock to Forward Steps, please follow the instructions below. Forward Steps is a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code, tax ID # 20-5092412. Please consult your tax advisor to discuss the gift you are considering and to determine the tax advantages for you.

Step 1.

Include the following details in your request to your broker:

- Expected date of transfer of shares
- Number of shares
- Name of stock
- Your mailing address
- Your phone number
- Name of charitable agency receiving shares: Forward Steps Foundation
- Agency contact information: Jennifer Waaler, Executive Director

Step 2.

Provide your broker with Forward Steps' brokerage account information:

Receiving Firm: Merrill Lynch

DTC #: 8862

Receiving account name: Forward Steps Foundation

Receiving account number: 429-02401

Contact information at Merrill Lynch: Blair Daniel 303.938.3925

Thank you for considering a gift of stock for Forward Steps! For more information, please contact:

Jennifer Falkoski
303-404-9966
jfalkoski@forwardsteps.org

