



CHARITABLE DONATIONS OF STOCK

The delivering firm (The Broker/Dealer firm where the shares are coming from) should supply you with a Letter of Authorization Form (LOA) that **MUST** include the following:

- Delivering firm's account number
- Registration (how the account is titled)
- Share amount to be delivered
- Security description
- Symbol or CUSIP number
- Client's Signature and date client signed the transfer request
- Receiving firm's information (for Wells Fargo Advisors):
 - **WELLS FARGO CLEARING SERVICES, LLC**
 - **TAX ID NUMBER 23-2384840**
 - **ACAT PARTICIPANT: 0141**
 - **CONTACT INFORMATION: ACCOUNT TRANSFER DEPT.**
 - **(855) 372-3526**
 - Receiving Client Account number: **2607-2804**
 - Registration (how account is titled): **CHILDREN'S DEFENSE FUND**
 - Type of account: **Type T- Religious/Non-profit**
 - Receiving DTC number- **0141 (for Wells Fargo Clearing Services)**

*It is very important that you state that the shares are **a gift/charitable donation** in order for the delivering firm to code them properly for fair market value/cost basis.

*Also, please note, if delivering any property **other than** general equity donations, the automatic DTC system (Depository Trust Clearing Corporation) cannot be used and a more manual process is required with possible changes in valuation (i.e. ACAT or Book Entry). Other donation types include: Mutual Fund shares, Annuities, Treasuries, etc.

To contact Wells Fargo with additional questions about a donation of stock to the Children's Defense Fund, please contact Kathleen Counts at 1-800-638-4682 or Kathleen.counts@wellsfargoadvisors.com

If you'd prefer to speak to someone at the Children's Defense Fund directly, please contact Mark Publow, CDF's Chief Development Officer, at 1-480-991-1619 or mpublow@childrensdefense.org