



## Gift of Securities to International Justice Mission

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**IMPORTANT:** Please note that when your financial institution sends your stock donation to IJM, they will not provide your name to IJM. In order for us to attribute the gift to you and provide you with a tax receipt, please email the information requested at the bottom of this sheet.

### Instructions for gifting securities to International Justice Mission

Donating securities that have appreciated in value to a charity such as International Justice Mission can be an extremely tax-effective way of giving. Usually, the donor will be able to take the full market value of the securities on the date they are transferred as an itemized deduction, without incurring any tax on the gain represented by the difference between his or her cost and the current market value.

How you can make a gift of securities depends on where those securities are held. The following instructions are intended to make this process as easy as possible.

#### For securities being held by a brokerage firm:

Tell your broker that you wish to donate the securities to International Justice Mission. Instruct broker to transfer the securities to:

- Charles Schwab & Co. Inc.
- FBO (for the benefit of) International Justice Mission (EIN: 54-1722887)
- Account number 4635-4409
- DTC routing number: 0164 Code 40
- IJM Contact Name: Katie Lawson

\*For mutual shares, please see the following instruction page.

**IMPORTANT:** When you have given these instructions for transfer, please notify IJM's Constituent Relations team at [donations@ijm.org](mailto:donations@ijm.org) providing the following:

- Number of Shares you are giving
- Company in which Stock is held
- Date of expected transaction (i.e. 40 shares in Coca-Cola transferred February 1, 2014)

This will allow us to fully and accurately acknowledge your gift with a tax-deductible receipt.

**For mutual fund shares held directly in an account with the mutual fund group:**

Ordinarily, you will have to provide the mutual fund written instructions to make the transfer. The signature (or signatures) of the account owner(s) on these instructions will have to be guaranteed by a bank or brokerage firm. Although requirements may vary among mutual fund sponsors, instructions along the following lines should work:

\_\_\_\_\_ (date)

I am (we are) the registered owner(s) of account number \_\_\_\_\_, holding shares of \_\_\_\_\_ (name of fund) \_\_\_\_\_. I (we) hereby instruct you to transfer \_\_\_\_\_ (number of shares) \_\_\_\_\_ of the Fund to an account in the following name:

International Justice Mission  
PO Box 58147  
Washington, DC 20037

By directing you to make this transfer, I intend to make a charitable gift of these shares to International Justice Mission (IJM). If you need further information to complete establishing an account for IJM, please contact them directly.

Very truly yours,

\_\_\_\_\_  
(signature of registered owner)

\_\_\_\_\_  
(joint owner, if any)

\_\_\_\_\_  
(street address)

\_\_\_\_\_  
(city and state)

Signature(s) guaranteed: \_\_\_\_\_

**IMPORTANT:** When you have given these instructions for mutual fund transfer, please email IJM's Constituent Relations team at [donations@ijm.org](mailto:donations@ijm.org) providing the following:

- Number of Shares you are giving
- Company in which Stock is held
- Date of expected transaction (i.e. 40 shares in Coca-Cola transferred February 1, 2014)

This will allow us to fully and accurately acknowledge your gift with a tax-deductible receipt.

If you need an overnight mailing address for IJM or your brokerage requires a physical address, please contact IJM's Constituent Relations team at 703.465.5495 or [donations@ijm.org](mailto:donations@ijm.org) for this information.