



SHADE

Gift of Stock Shares & Mutual Funds

SHADE is happy to receive stock gifts of publicly traded companies and mutual funds for our non-profit 501(c)3 in support of our mission and vision goals.

Please instruct your broker to transfer using the following instructions:

DTC Eligible Securities

DTC # 0075

FBO: SHADE

LPL Financial Account # 3465-4548

Physical Certificates

LPL Financial

FBO: SHADE

LPL Financial Account # 3465-4548

Mail to LPL Financial at 44675 Cape Court, Suite 100, Ashburn, VA 20147

Mutual Funds

ACAT Participating Firms: Please transfer via the Partial ACAT Delivery System using the following information:

FBO: SHADE

TID:47-1489275

LPL Financial Account # 3465-4548

Questions may be directed to our treasurer, Carolyn Cuppernull at 703-216-1974 or carolyn@shadetz.org.

After you initiate a transfer, please send an email to contact@shadetz.org or a letter to SHADE at PO Box 398, Great Falls, VA. 22066. Please specify the name of the stock, the number of shares, the gift designation if known, and your contact information. Thank you for blessing SHADE with your gift!

In accordance with IRS requirements, all gifts given must be treated as belonging fully to SHADE and are subject to its control. The IRS requires that SHADE have the power to modify any restriction or designation if, in its sole judgement, such restriction becomes, in effect, unnecessary, incapable of fulfillment or inconsistent with the charitable purpose of SHADE.