



DONATION OF SECURITIES FORM

Thank you for your gift of securities to Oakland Promise.

Please fill out the information below:

_____ Name & Type of Securities (ex: IBM common stock)	_____ Number of Shares	_____ Date of Transfer
_____ Donor's Name	_____ Broker's Name	
_____ Donor's Street Address	_____ Broker's Company	
_____ Donor's City/State/Zip	_____ Broker's Phone Number	

Donor's Phone Number (Will only be used if question arises or a problem occurs in the donation process)

Oakland Promise's broker: **Charles Schwab**

Oakland Promise's account number with Charles Schwab is: **#2934-9412**

For electronic transfers, our Depository Trust Company (DTC) number is: **0164**

Oakland Promise's tax identification number (FEIN) is: **54-2103707**

After Oakland Promise receives this form and our broker confirms the donation of securities, the development staff will issue an official acknowledgment letter to the donor. This letter will indicate the number and type of shares received and date the stock was converted into a gift (day when record ownership of stock was transferred to Oakland Promise or the stock was unconditionally delivered to Oakland Promise).

All contributions are tax-deductible to the fullest extent provided by law. Every effort will be made to sell marketable securities as quickly as possible. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift. The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules.

Please contact Adam Berke at Oakland Promise: 510-210-3671 or adam@oaklandpromise.org for any questions.