



Securities Transfer Instructions

Thank you for your generous support for LSSNCA. To ensure your transfer is effective in the same year it is given, it is important the transfer be initiated on or before December 15 of that year. We cannot guarantee that later transfers will be completed by December 31.

Provide your broker/transfer agent with instructions to transfer ___ number of shares of _____ stock to Lutheran Social Services of the National Capital Area, Inc (“LSSNCA”) (EIN 53-0207407):

Broker Name: Charles Schwab & Co., Inc.

Account Number: 2312-0562

DTC#: 0164

Charles Schwab Asset Transfers Team Direct Line: 877-263-2381

Contact the Development Department at development@lssnca.org or 202-723-3000 to inform LSSNCA about the pending transfer.

Please note, your stock may be transferred to us without any identifying information. In order for us to credit the gift to you and send an acknowledgement for your tax purposes, please be sure to send us the following information via email or voicemail.

- Name of securities;
- Number of shares you are transferring;
- Name of broker and firm, including contact information; and
- Your address, phone number, and email address

To donate other kinds of securities (for example, stocks held in certificate form, mutual funds, or planned gifts), please reach out to the Development Department at development@lssnca.org or call 202-723-3000 and follow the prompts to reach the Development Department.