

**Instructions for Donating Stock/Securities**

Thank you for considering a gift of appreciated securities to Tempe Community Action Agency. Below are the instructions to facilitate an electronic transfer of stock to our brokerage account.

**Brokerage Account Information:**

- **Receiving Firm Name:** J.P. Morgan Wealth Management Brokerage firm
- **DTC Number:** 0352
- **Account Name:** Tempe Community Action Agency
- **Account Number:** 74167794
- **Brokerage firm address:**  
J.P. Morgan Wealth Management  
Attn: Transfer - WM  
10 South Dearborn Street  
Chicago, IL 60603-5506

**Important Steps for Donors:****1. Notify Your Broker/Financial Advisor:**

Contact your brokerage firm or financial advisor to initiate the transfer of securities. Provide them with the account information listed above.

**2. Notify TCAA of Your Gift:**

To ensure proper acknowledgment and tax documentation, please inform us of your intent to donate stock by providing the following details:

- Your name and contact information
- Name of stock/security and number of shares
- Approximate date of transfer
- Purpose or designation of the gift (if applicable)

You may send this information to: Carrie Aranda at [carriea@tempeaction.org](mailto:carriea@tempeaction.org)

**3. Tax Acknowledgment:**

The value of your donation will be determined based on the average of the high and low prices of the stock on the effective date of transfer to [Nonprofit Organization Name]'s brokerage account. You will receive a written acknowledgment for your tax records after the transfer is complete.

**Need Assistance?**

If you or your financial advisor have any questions, please contact:

Carrie Aranda, Director of Mission Advancement | [carriea@tempeaction.org](mailto:carriea@tempeaction.org) | 480-422-8922 ext 5893

Thank you for your generous support of TCAA!