When SARC receives stock gifts, the shares must first be transferred into SARC’s brokerage account. SARC then liquidates the shares as soon as allowable and the proceeds are invested according to our investment policy. Your financial institution will not transfer the stock without your written authorization. SARC has a brokerage account with TD Ameritrade.

Please notify your broker and SARC as soon as possible that you would like the gift of X amount of shares and XYZ Company stock to SARC. Please use the sample template letter provided below to do this. Please then email or fax a copy of the letter to SARC at the same time that you send the letter to your broker. As soon as this step is complete, please notify the Development Director at SARC immediately so that SARC is made aware of the pending transfer.

TD Ameritrade
SARC Account
DTC: #0188
A/C: # 72560684
Attn: Monica Kim
Phone: 410-616-2004
1313 York Road
Lutherville-Timonium, MD 21093

SAMPLE BROKER LETTER:

Date:

Donor’s Broker Name Donors Broker Firm Name
CITY, STATE ZIP

Dear (Insert Broker Name):

This letter is to authorize you to deliver (INSERT NUMBER) shares of (INSERT NAME OF COMPANY) stock from my account number to SARC. I will be calling to ensure the transfer has taken place.

The information that you will need to make this transfer is as follows:
Deliver to:
TD Ameritrade
1313 York Road, Lutherville-Timonium, MD 21093
ATTN: Monica Kim
Contact Phone: 410616-2004
DTC#: 0188
Receiving Account#: 72560684
Receiving Account Name: SARC
Tax I.D. #: 52-1224705

This gift of stock is for: (Please select the appropriate fund):

___ General Operating
___ New Sahfehouse
___ Other (please make a note)

I understand that my gift of stock is irrevocable and becomes an asset held by SARC, which maintains full fiduciary responsibility and ownership of this gift. If you have questions, please contact the SARC Development Department for assistance at 410-836-8431.

www.sarc-maryland.org