



## Stock, Bond, and Annuity Transfer Instructions

Donating stocks or bonds can provide you a tax shelter from capital gains while increasing the funds available to us. Please use this form to complete your transfer request with your brokerage institution and to notify Dar a Luz of your donation.

### Stock or bond transfer:

Obtain a transfer form from your brokerage institution. Here's the information they will request:

For credit to: Dar a Luz Birth & Health Center

Tax ID# (EIN): 26-0872252

Receiving institution: Charles Schwab Bank

DTC number: 0164, code 40

Account number: 8222-5966

**Physical Stock Certificates:** Mail to the address below.

### Information that Dar a Luz needs from you:

Date of transfer: \_\_\_\_\_

Ticker symbol of stock or bond: \_\_\_\_\_

Name of stock or bond: \_\_\_\_\_

Number of shares to be transferred: \_\_\_\_\_

Name of donor(s): \_\_\_\_\_

Address: \_\_\_\_\_

City, state, and zip: \_\_\_\_\_

Phone number(s): \_\_\_\_\_

Email address(es): \_\_\_\_\_

If you are funding a Charitable Gift Annuity, please provide the cost basis:

\_\_\_\_\_

### Please return completed form in one of the following ways:

Email: [info@daraluzbirthcenter.org](mailto:info@daraluzbirthcenter.org)

Fax: (505) 554-3673

Mail: Dar a Luz Birth & Health Center, Attn: Accounting, 7708 4<sup>th</sup> St NW,  
Los Ranchos, NM, 87107.

We usually sell transferred assets within 5 business days. If you have any questions, please call **(505) 924-2229** and ask for accounting. Thank you!

7708 4<sup>th</sup> Street NW, Los Ranchos, NM 87107

T 505.924.BABY F 505.554.3673

[www.daraluzbirthcenter.org](http://www.daraluzbirthcenter.org)