



The Learning Alliance

Stock Delivery Instructions

To make a stock donation, please provide your financial institution with the information below. We also ask that you notify our Finance Manager of your incoming gift so that proper acknowledgement may be made.

TO MAKE A STOCK DONATION

Please provide the information below to your financial institution.

DTC (Depository Trust Company) Electronic Delivery:

DTC ID # 0226

National Financial Service Corporations

For the Benefit of: The Learning Alliance

Account number: Z48-773397

PLEASE SEND NOTIFICATION OF YOUR INCOMING GIFT TO:

Tricia Boyle, Finance Manager

TBoyle@TheLearningAlliance.org

(877) 548 - 7323

"When a donor transfers a stock held for more than one year, the Charitable Organization receives 100% of the average value of the security on the date of transfer. The donor captures 100% of that value as a tax deduction and pays no long term capital gains tax as they would if the security were simply sold." - Andy Sowers, TLA Board of Directors Treasurer