

Making a Gift of Stock

Thank you for your support of Habitat for Humanity of Evansville and your interest in making a charitable gift in the form of publicly traded securities such as stock or mutual funds.

Your first step in completing the transfer is to contact your financial advisor to request their required procedures and forms and provide them with the delivery instructions found below. Please ask them to include your name in all deliveries.

Please contact Sr. Jane Michele McClure at (812) 423-5623, ext. 226, (812) 430-2159 (call or text), or email jmclure@evansvillehabitat.org to let Habitat know of your intent and gift instructions. You may also ask your financial advisor to contact Sr. Jane Michele in order to complete the transfer.

To complete your transfer, please know that Habitat for Humanity of Evansville (Tax ID Number: 35-1602775) works with —
Jennifer Decker
Donaldson Capital Management
20 N. W. 1st Street, Fifth Floor
Evansville, IN 47708
(812) 402-1015 jdecker@dcmol.com

Here are the instructions your financial advisor will need to complete the transfer —
Clearing Firm: Charles Schwab & Co., Inc.
Tax ID Number: 94-1737782
DTC Clearing: 0164, Code: 40
For the account of: Habitat for Humanity of Evansville
Account Number: 8591-3170

Your financial advisor will especially want to know the DTC number (0164, Code: 40) and the Account Number (8591-3170). Please have your financial advisor contact Sr. Jane Michele McClure at (812) 423-5623, ext. 226, with your name, mailing address, type of stock and number of shares to ensure your gift is properly acknowledged.

We suggest you consult your tax advisor for complete information regarding the tax deductibility of your gift. Because you are transferring ownership rather than selling the stock, you may also save on other fees.

Again, many thanks for your thoughtful action which will have a profound impact on the Habitat ministry!