



STOCK TRANSFER INSTRUCTIONS

Name of Organization/Account Name:	Mizell Center
Recipient Firm/Brokerage:	Charles Schwab (on behalf of Mizell Center)
Account Number:	5669-5166
DTC Clearing Number:	0164

Mizell Center is registered 501(c)(3) public charity.

How to Donate Stock:

1. Contact your broker and inform them you would like to transfer stock to Mizell Center.
2. Follow your broker's instructions on how to complete the necessary paperwork and transfer the stock.
3. Notify Mizell Center about the donation and provide us with the relevant information. When receiving a gift of stocks, bonds or mutual funds, Mizell Center does not receive information that identifies you, so we need you to tell us.
4. Keep records. Mizell Center will send you a confirmation of your donation, which you'll need for tax purposes. Remember, we need you to inform of us of the transfer.

When you donate stock to Mizell Center, you do not pay capital gains tax on the increase in value since you bought the stock. You can also deduct the fair market value of the donated stock from your income taxes, potentially saving you a significant amount of money. And, Mizell Center receives the full fair market value of the stock, rather than just the proceeds after taxes, as would be the case if you sold the stock and then donated the cash.

Mizell Center encourages you to consult a tax professional to best understand your specific situation and the applicable tax law.

Should you have questions or need support in donating, please contact Kristin Bloomer, Director of Development, at KristinB@mizell.org.

Thank you for considering Mizell Center in your charitable giving. You are making a difference in the lives of seniors across the Coachella Valley.