

THE SALVATION ARMY

Instructions to Donate Mutual Fund Shares

Your gift to The Salvation Army can be used to benefit any area or specific program in the Western Division - Nebraska, South Dakota, Iowa.

Step 1: Transfer of Mutual Funds:

Contact your mutual fund company or broker for directions and to receive an Account Transfer Form. Please complete the form fully and have your signature Medallion guaranteed at the financial institution of your choice. The date of your gift for tax purposes is the date your shares are received into our account.

Step 2: Notify The Salvation Army:

It is very important that you complete and mail, fax, or e-mail us Attachment I so that we can distribute the proceeds according to your wishes and send you an acknowledgment which complies with IRS regulations.

The Salvation Army
Planned Giving Department
3612 Cuming Street
Omaha, NE 68131

(Fax) 402-898-5853
(Local) 402-898-5912
(Toll Free) 800-274-0628

e-mail: wst_pg@usc.salvationarmy.org
www.salarmygiving.org

Tax ID #36-2167910

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ATTACHMENT I

LETTER OF INTENT FOR GIFTS OF MUTUAL FUNDS

I hereby donate _____ shares;

or \$ _____ of _____ mutual fund to:

The Salvation Army
Western Division
3612 Cuming Street
Omaha, NE 68131.
402-898-5912

Check one:

_____ outright gift

_____ fund a charitable gift annuity

Donor's Name(s): _____

Address: _____

Phone: _____

Donor(s) Signature(s): _____

Donor's broker/agent: _____

Broker/Agent Phone: _____

Gifts can be restricted to a specific community and/or program.

Directions for use of gift: _____

