



Instructions for Transferring Stock to the Northwest School of Wooden Boatbuilding

Shares of stock can be transferred to the Northwest School of Wooden Boatbuilding brokerage account at Fidelity Investments. Below is the information you will need when transferring shares.

Fidelity Account Number: Z50-215309

Fidelity Account Type: Corporate Brokerage Account

Fidelity DTC number: 0226

Fidelity's mailing address is: Fidelity Investments
Attn: TOA Receives
P.O. Box 770001
Cincinnati, OH 45277-0036

NWSWB Tax ID: 91-1122839

To learn more, visit Fidelity's website for general information at www.fidelity.com/customer-service/how-to-gift-shares

- ❖ Donor names may not transfer along with the stock shares, so it is helpful for you to notify us in advance of the type and number of shares you are gifting and the estimated date of the transfer. We'd also like to know how you would like to be named (or remain anonymous) for donor acknowledgements. Please contact NWSWB's Executive Director Betsy Davis at betsy@nswb.edu or 206-390-0381 to notify of share transfers or for any questions you may have.
- ❖ NWSWB follows IRS rules when acknowledging gifts of stock.
 - NWSWB credits a stock donation the day it is *received* in NWSWB's account, not the date of transfer from the donor's account.
 - NWSWB acknowledgement letter will cite the number of shares received, but no dollar amount. Please consult your attorney and/or tax advisor regarding the special regulations and requirements related to stock and other non-cash gifts, including the substantiation necessary to claim a charitable deduction, if applicable.