How to Transfer Stock or Mutual Funds

Thank you for your interest in making a gift to Compassion & Choices in the form of a Stock or Mutual Funds Transfer.

Gifts of Stock

If your stock is held with a brokerage firm or bank trust department, you can transfer the securities directly from the firm or bank to Compassion & Choices’ account at Charles Schwab.

**Step 1:** Instruct the holding institution to make a direct transfer, or “DTC,” with the following instructions:

Please deliver/transfer ____________shares of __________________ (name and symbol) from my account with ____________________________________(name of firm or bank), account number __________________________, to:

DTC #0164 Code 40

Charles Schwab & Co., Inc.

For further credit to: Compassion & Choices Account #3225-5593.

**Step 2:** When stocks arrive in our account, we often get no information about the donor so please don’t forget to tell us you have made this generous gift! Contact Sam Young at 303.217.2152 or plannedgiving@compassionandchoices.org and tell him how many shares and the name of the stock, so we can send your gift receipt. Unless you tell us, we may not know who sent the gift.

Gifts of Physical Stock and Wire Transfers

We’re happy to assist you with transferring a gift of physical stock that you may be holding in traditional paper form, or to facilitate a direct wire transfer from your financial institution. These gifts involve specific steps and information, so please contact Sam Young at 303.217.2152 or plannedgiving@compassionandchoices.org for more details.

Mutual Funds

It’s a bit more involved to transfer mutual funds, but we can help. Contact Sam Young at 303.217.2152 or plannedgiving@compassionandchoices.org, and he will be glad to assist you.