

# Stock Donation Instructions

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Thank you for considering a charitable stock donation to Lifewater International. Lifewater can accept most investments; it is important that you consult with your tax advisor on any consequences of this transaction.

Lifewater's Brokerage Account is through Maguire Investments. Maguire Investments, Inc. clears through National Financial Services, LLC (NFS). You can contact our Brokerage Account Manager, Chad Silva, to discuss any questions about making a contribution through National Financial Services, LLC. Chad can be reached at 800.244.4183 or [chad@maguireinvest.com](mailto:chad@maguireinvest.com).

The process of gifting securities involves your authorization of transferring the designated investments into Lifewater's brokerage account. This can be done electronically or manually.

Provide the account information below to your financial professional and they should be able to process the transfer after you complete their requested paperwork. If you hold securities directly, please contact Chad Silva and he will assist you.

## Lifewater's Brokerage Account:

Lifewater Brokerage Account #: 0QF878508

Title of Account:

Lifewater International

PO Box 3131

San Luis Obispo, CA 93403-3131

NFS Electronic Brokerage ID: DTC# 0226

Maguire Investments, Inc.

PO Box 1848

Santa Maria, CA 93456



## Additional Instructions:

To ensure proper recording, receipting and stewardship of the gift, please provide the following prior to making the gift:

- Contact Daren Wendell (Director of Donor Relations) at [daren@lifewater.org](mailto:daren@lifewater.org)
- The name and contact information of the donor including address and phone
- Estimated value of and securities and company name
- Date of gift issuance

If you have any questions, please don't hesitate to contact Daren Wendell at 309.531.3889

*Your charitable deduction will be valued at the median market price on the date of the gift. The legal gift date for certificates that are mailed is the postmark date on the carrier envelop. For securities wired into our account, the legal gift date is the day they are received in to our account.*

