

# Gifting Securities for the Benefit of Lifewater International



Use this form and instructions below to contribute publicly-traded securities to Barnabas Foundation and have the proceeds from the sale forwarded to Lifewater International.



## Step 1

**Contact your financial advisor/broker** about your intent to electronically transfer securities to Barnabas Foundation. Typically, your advisor will have a form for you to complete or request a letter of instruction requiring the following information about Barnabas Foundation's brokerage account:

**Name of Receiving Firm** E\*Trade Securities  
**DTC** 0386  
**Account Number** 5550-3250  
**Receiving Acct Name** Barnabas Foundation, EIN #36-2904503  
(NOTE: do not include Lifewater International, only list Barnabas Foundation)  
**E\*Trade Contact** platinum4@etrade.com or 1-800-503-9260

## Step 2

**Notify Barnabas Foundation of your gift** by returning this document via e-mail to [gifts@BarnabasFoundation.com](mailto:gifts@BarnabasFoundation.com), or call 1-888-448-3040, ext. 4 to provide information.

<b>Contributor's Name</b>	<input type="text"/>		
<b>Contributor's Address</b>	<input type="text"/>		
<b>Contributor's Email Address</b>	<input type="text"/>		
<b>Name of Security and/or Symbol</b>	<input type="text"/>	Number of shares	<input type="text"/>
<b>Name of Security and/or Symbol</b>	<input type="text"/>	Number of shares	<input type="text"/>
<b>Name of Security and/or Symbol</b>	<input type="text"/>	Number of shares	<input type="text"/>
<b>Other Information</b>	<input type="text"/>		

\*If gifting more than 3 securities, please include an additional form. \*\*If we do not receive notification of a gift, the shares will be liquidated and placed in a holding account until claimed. Unclaimed gifts are transferred to the Barnabas Foundation Operating Fund.

## Step 3

**Confirm your transfer.** Transfers must be initiated by your financial advisor/broker. Please confirm with them that the shares have been transferred from your account to Barnabas Foundation's account.

Barnabas Foundation will provide you a charitable receipt for your contribution including its value for IRS reporting purposes. Lifewater International will also receive a copy of the letter. The gift amount for charitable donation purposes will be the average of the high and low share price on the day the share is received.

If your security is held directly at a transfer agent, proprietary mutual fund firm, or in physical certificate form, contact Barnabas Foundation for details on how to transfer your shares.

**If you have any questions regarding the gifting of securities, please do not hesitate to contact us at [gifts@BarnabasFoundation.com](mailto:gifts@BarnabasFoundation.com) or 888.448.3040, extension 4. We are happy to assist you!**