

## Instructions for Giving Gifts of Securities (Stocks Or Bonds)

Thank you for your interest in supporting Habitat for Humanity of Greater Los Angeles (Habitat LA) through a stock donation. Appreciated securities are perhaps the most cost-effective assets to use in making a gift. When you transfer ownership of long-term holdings to Habitat LA, you receive a charitable deduction for their full market value-- and you incur no capital gains tax (subject to IRS deduction limits).

Because electronic transfers are made without identifying the donor, please alert us in advance about the stock and number of shares you plan to give. You can do so by contacting **Marina Garcia** either at (310) 818-5230 or via e-mail at **Mgarcia@habitatla.org**.

According to IRS regulations, the date of your gift corresponds to the date it arrives in our possession (for transfers from brokerage account to brokerage account).

### The Following Information is Necessary to Transfer Stock to Our Account:

- Please contact our broker, **Geoff Delahanty** at **Thrivent Investment Management** for assistance with making the stock transfer.
- If the transfer is coming from a Thrivent account, please complete the gift request form (to be provided by Habitat LA or Thrivent).
- When your stock gift is received, we will mail you a tax receipt stating the name of the stock, the number of shares and the fair market value on the date it was received by Habitat for Humanity of Greater Los Angeles.

| Habitat for Humanity of Greater Los Angeles' Account Details |   |
|--|---|
| Account Name   | Habitat for Humanity of Greater Los Angeles   |
| Tax ID Number  | 33-0416470  |
| Account Number   | TY9-136091  |
| Broker DTC Number  | 0226  |
| Investment Advisor   | Geoff T. Delahanty, FIC, RICP®<br>Wealth Advisor, West Advisor Group<br>Big Island So Cal Group<br>CA Insurance ID No.: 0E71619<br>Thrivent Financial<br>4909 Lakewood Blvd., Ste. 305, Lakewood, CA 90712<br>Phone: 562-981-1358<br>E-mail: geoff.delahanty@thrivent.com |