

FIELD ARTS & EVENTS HALL

201 W Front St - P.O. Box 71
PORT ANGELES, WA 98362

360.477.4679
FIELDHALLEVENTS.ORG

Port Angeles Waterfront Center DBA Field Arts & Events Hall is an exempt organization as described in Section 501(c)(3) of the Internal Revenue Code.

EIN: 81-3062077

Appreciated Stock – Charitable Giving Instructions

Step-by-Step Guide

1. Contact *your* broker for their stock donation process forms. The forms and documentation required may vary, work closely with your broker to ensure the entire process is completed correctly. For instance, some brokers may require you to get a Medallion Stamp Guarantee from a licensed individual before they can complete the transfer.
2. Print out the transfer forms your broker gives you, there might be several forms. Each needs to be printed and completed *in ink*. Port Angeles Waterfront Center's address, account details, etc. are included in the second page of this document to reference.
3. Submit the original forms to your broker by email, delivery service, or in person. Be sure to note the confirmation number provided by your broker for your records.,
4. Notify Port Angeles Waterfront Center that you have initiated the transfer.
5. Follow up with us to verify that we have received the transfer. A follow-up is important to ensure the correct fair market value ascribed to your donated stock is received. Otherwise, if the share price drops, you could get a tax receipt for less than the value you had intended.

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Appreciated Stock – Charitable Giving Instructions, continued.

Account Details

Provide the following information to your broker in order to accurately transfer securities from your account.

Securities held by a broker may be delivered by wire transfer through the Depository Trust Company (DTC) to the Port Angeles Waterfront Center.

Broker: D.A. Davidson

DTC#0361

Contact: Jodi Kortman, Chris Simmons, or Kurt Anderson

Phone: 360-565-7500

Mailing address: 917 E Front St, Port Angeles, WA 98362

Email: jkortman@dadco.com

Port Angeles Waterfront Center

Account: 3998-3340

Contact: Steve Raider-Ginsburg, Executive Director

Phone: 360-477-4679

Email: steve@fieldhallevents.org

If the distribution is from an IRA, the check must be made directly to the charity. It cannot go to you first.

Have your brokerage firm write a check to Port Angeles Waterfront Center and send it to the D.A. Davidson office at the address provided below.

**DA Davidson & Co.
FBO/ Account number 3998-3340
Port Angeles Waterfront Center
917 E Front Street
Port Angeles, WA 98362**

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Domestic Wire Instructions

Bank: First Interstate Bank
401 North 31st Street
Billings, MT 59101

ABA Routing #: 092901683

Davidson Account #: 902896

Credit: D.A. Davidson & Co.
8 3rd Street North
Great Falls, MT 59401

To Further Credit

Client Name: Port Angeles Waterfront Center

Client's Brokerage Account Number: 3998-3340

Please provide all information to the bank when wiring to a Davidson account

*****Please note:** These instructions are for incoming Fedwire's only. Any attempt to use these instructions for ACH (Automated Clearing House), direct account to account transfers or deposits will result in rejection. This includes non-wire transactions initiated from another First Interstate Bank Account.

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Check by Mail Instructions

Write a check to Field Arts & Events Hall and send it to the address provided below.

**Field Arts & Events Hall
P.O. Box 71
Port Angeles, WA 98362**

Questions

If you have any questions, please contact Steve Raider-Ginsburg, Executive Director, directly by email at

Steve@fieldhallevts.org

**Thank you for supporting the
Port Angeles Waterfront Center and
Field Arts & Events Hall!**