



# Gift of Stock

WARRIOR COMMITTED

Thank you for your commitment to supporting Warriors by making a charitable gift to The Warrior Alliance (TWA) in the form of a Stock Transfer.

For stock held in brokerage accounts, your broker can aid you in making a gift of stock via a direct transfer to TWA. Giving a gift of publicly-traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock, and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to donate stock to The Warrior Alliance (Tax ID# 47-1049454), please note the following:

- Brokerage House: Wells Fargo
- Account Name: The Warrior Alliance, Inc.
- Account Number: 2899-5542
- Sub Firm Number: 205
- DTC Number: 0141
- Reference: Donor Name *(Including your name will ensure proper gift acknowledgment)*

## **The process to complete the Stock Transfer:**

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1. Contact your broker to initiate the transfer. *(See example letter)*
2. Complete the attached form and send it in to inform TWA Fundraising & Development Department about the transfer. ***The form must be completed to receive a tax acknowledgment letter.***
3. Send the Securities to TWA
  - a. Electronic Method – Please use the details above.
  - b. Mail Method – Please mail your Unendorsed certificate(s) with a Stock or Bond Power Form by registered mail to:  
The Warrior Alliance  
Attn: Fundraising & Development Dept.  
1000 Abernathy Road, Suite L-10  
Atlanta, Georgia 30328  
(404) 210-1776 ext. 4

*\*Certificates already registered in the name of The Warrior Alliance do not require either the stock waiver or stock power for the execution of the transfer.*



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## Example Letter to Brokerage Firm:

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Dear [Broker],

I would like to make a gift of stock on [insert date] to The Warrior Alliance. Please transfer [number] shares of [company name] to the charity on [state month and year when you would like transfer to occur].

Use the following transfer information:

Wells Fargo  
DTC Number: 0141  
Sub Firm: 205  
Account Name: The Warrior Alliance, Inc. (Tax ID# 47-1049454)  
Account Number: 2899-5542

It is essential to notify the TWA Fundraising & Development Department of the transferred gift. Contact information is as follows:

The Warrior Alliance  
Attn: Joey Tripp, Director of Development  
1000 Abernathy Road, Suite L-10  
Atlanta, Georgia 30328  
Email: [jtripp@thewarrioralliance.org](mailto:jtripp@thewarrioralliance.org)  
Phone: (404) 210-1776 ext. 4

The Warrior Alliance will provide me with a receipt for this gift. Thank you for your prompt attention to this matter.

Sincerely,



# Gift of Stock Form

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Please complete the information below to inform The Warrior Alliance (TWA) of your gift to ensure accurate processing and acknowledgment. Thank you for being Warrior Committee and choosing TWA as the recipient of your charitable donation.

## DONOR & SECURITIES INFORMATION:

_____ Name & Type of Securities (e.g., Apple common stock)	_____ Security Symbol	_____ Number of Shares	_____ Transfer Date
			<input type="radio"/> Yes <input checked="" type="radio"/> No
_____ Donor Name (Individual, Corporation, or Foundation)      Recognize the gift anonymously?			
_____ Donor Street Address			
_____ Donor City / State / Zip			
_____ Donor Telephone Number			
_____ Donor Email Address			
_____ Broker Name			
_____ Broker Company / City / State			
_____ Broker Contact / Telephone Number			

_____ Primary Donor Signature	_____ Date	_____ Secondary Donor Signature	_____ Date
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*You may be eligible to increase the power of your donation with an employer matching grant. Many employers will match your donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.*

Send the completed form to:

**Mail** The Warrior Alliance  
Attn: Joey Tripp, Director of Development  
1000 Abernathy Road, Suite L-10  
Atlanta, Georgia 30328

**Email** Joey Tripp, Director of Development  
Development  
[jtripp@thewarrioralliance.org](mailto:jtripp@thewarrioralliance.org)  
(404) 210-2740