CHARITABLE DONATIONS OF STOCK

The delivering firm (The Broker/Dealer firm where the shares are coming from) should supply you with a Letter of Authorization Form (LOA) that MUST include the following:

- Delivering firm’s account number
- Registration (how the account is titled)
- Share amount to be delivered
- Security description
- Symbol or CUSIP number
- Client’s Signature and date client signed the transfer request
- Receiving firm’s information (for Wells Fargo Advisors):
  - WELLS FARGO CLEARING SERVICES, LLC
  - TAX ID NUMBER 23-2384840
  - ACAT PARTICIPANT: 0141
  - CONTACT INFORMATION: ACCOUNT TRANSFER DEPT.
    - (855) 372-3526
      - Receiving Client Account number: 2607-2804
      - Registration (how account is titled): CHILDREN’S DEFENSE FUND
      - Type of account: Type T- Religious/Non-profit
      - Receiving DTC number- 0141 (for Wells Fargo Clearing Services)

*It is very important that you state that the shares are a gift/charitable donation in order for the delivering firm to code them properly for fair market value/cost basis.

*Also, please note, if delivering any property other than general equity donations, the automatic DTC system (Depository Trust Clearing Corporation) cannot be used and a more manual process is required with possible changes in valuation (i.e. ACAT or Book Entry). Other donation types include: Mutual Fund shares, Annuities, Treasuries, etc.

To contact Wells Fargo with additional questions about a donation of stock to the Children’s Defense Fund, please contact Kathleen Counts at 1-800-638-4682 or Kathleen.counts@wellsfargoadvisors.com

If you’d prefer to speak to someone at the Children’s Defense Fund directly, please contact Mark Publow, CDF’s Chief Development Officer, at 1-480-991-1619 or mpublow@childrensdefense.org