

Tax Deductible Donations of Stocks to Halo House Foundation

Stock

Thank you for your interest in support of Halo House Foundation. To help you facilitate a gift of stock, please use the following three simple steps:

Step 1: Initiate the Stock Transfer

Securities can be gifted to Halo House Foundation in two ways: either via electronic transfer (in which your broker transfers shares using the Halo House Foundation DTC number) or by physically mailing the paper certificates to Halo House. Either method is acceptable, but it is necessary for you to contact your broker to initiate the transfer. A sample letter for your broker can be downloaded from our website.

Step 2: Send the Securities to Halo House Electronically by Asking your broker to process your donation through TD Ameritrade

TD Ameritrade

DTC # 0188

Further credit to: Halo House Foundation (Tax ID# 27-1220705)

Account Number: 936-003152

Step 3. Notify Halo House Foundation by Filling Out the Form Below

Each time a gift of stock is donated, regardless of the method chosen to deliver a gift of stock, information about the gift for audit and acknowledgment purposes is needed. Fields with an asterisk are required.

Notification of Tax Deductible Donation of Stock to the Halo House Foundation
(Please print clearly)

First Name _____ Last Name _____

Street Address _____

City _____ State _____

Zip Code _____ Country _____

Email* _____

Does donor wish to remain anonymous? Yes / No (circle one)

Date of Transfer: _____ (month) _____ (day) _____ (year)

What is the approximate value of the stocks you would like to donate? \$ _____

Number of Shares? _____

Name of Security _____

What Halo House program should the gift be directed?

- Where the Need is Greatest
- General Operations
- Capital Campaign Fund

Transferring Broker's Name _____ (first) _____ (last name)

What firm is the broker with? _____

What state is the firm located? _____

Firm Phone Number _____

Send to: Halo House Foundation
4010 Blue Bonnet Blvd. Suite #110
Houston, TX 77025
E-mail: mail@halohousefoundation.org

Phone: (713) 665-8852 Fax: (713) 391-8365