



## Instructions for Gifts of Stock and Mutual Funds

Thank you for supporting Seeding Justice with a gift of stock or other securities, and for letting Seeding Justice know about your gift, as stock gifts come through to our account without donor information attached. Your completing and returning this form allows us to ensure that you are properly credited and acknowledged for your gift. *Please keep in mind that your gift of stock or mutual funds must be received by Seeding Justice’s broker by December 31 to count as a tax deduction for that year.*

Questions? Contact Development Director Dena Zaldúa at [dena@seedingjustice.org](mailto:dena@seedingjustice.org) or 503-289-1517, x2.

### 1 Direct your gift to our broker:

**Contact:**

Progressive Investment Management  
256 Oakway Center  
Eugene, OR 97401

*Portland Office:*

5100 SW Macadam, Suite 160  
Portland, OR 97239

Carsten Henningsen  
877-211-0034, x4

[carsten@ProgressiveInvestment.com](mailto:carsten@ProgressiveInvestment.com)  
<http://www.ProgressiveInvestment.com>

**Seeding Justice Account Info :**

Charles Schwab & Co., Inc.

Seeding Justice

Account #: 6112-9067

DTC #: 0164

Seeding Justice Tax ID #: 93-0691187

### 2 Complete the following information:

Your Name(s) & Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Name(s) of the stock/mutual fund: \_\_\_\_\_

Number of shares: \_\_\_\_\_ Date of gift: \_\_\_\_\_

Estimated value of gift: \$ \_\_\_\_\_

### 3 Send this form to Seeding Justice

Via email to [dena@seedingjustice.org](mailto:dena@seedingjustice.org) or via mail to the address below.

*Please note that this instruction sheet should not be construed as legal or tax advice. Please contact your own accountant, attorney, or tax advisor for assistance regarding stock gifts you may be considering making to Seeding Justice.*