



Since 1966

INSPIRING HOPE. EMPOWERING INDEPENDENCE.

Stock Donations

Broker, please include donor name in the transaction description to Heritage Wealth Strategies on the delivery specified below.

Donor Name: _____ Address: _____

Donor Email: _____ City/State/Zip: _____

To: _____ (Broker or Bank Name & Contact)

From: _____ (Donor Name)

CC: Impact NW (please forward copy of transaction to them at donate@impactnw.org)

Date: _____ (Current Date)

RE: Account No. 6TX16058

Please accept this memo as your authorization to make a gift to the Stock Donation Investment Account fund of Impact NW from my referenced account as soon as possible or on _____ (specify date). If you need to contact me or have questions regarding these instructions, my number is _____.

Please deliver (check applicable boxes):

_____ shares/units of _____ Cash in the amount of \$ _____
(specify stock or bond—see below for mutual funds)

The following are the delivery instructions:

Electronic Delivery

Cetera Wiring Instructions – Cash

Wells Fargo Bank – San Francisco, CA
420 Montgomery Street
San Francisco CA 94104
ABA: 121000248
Credit Cetera Investment Services LLC
Account: 2000014509375
Final Credit*: Impact NW Account# 6TX16058

Cetera Fed Entry Securities

Institution: Cetera Investment Services LLC
ABA: 071000288
FAO: 1013022393
Account Name: Impact NW
Account#: 6TX16058

Cetera Securities Donation – Stock

Institution: Cetera Investment Services LLC
Account Name: Impact NW
Account#: 6TX16058
DTC#: 0701

Physical Delivery

Please send certificate and stock power to: Heritage Bank Attn: Kimberly Superneau 1000 SW Broadway, Suite 2170 Portland, OR 97205. **IMPORTANT:** Please do not sign the stock certificate or complete any information on the back of the certificate; instead sign the stock power exactly how the registration appears on the stock certificate. Do not complete any other information on the stock power other than the signature. **Include a copy of this memo with the stock certificate to Heritage Bank.**

Donor Signature(s)

Date