



**IMPACT NW**  
PREVENTING HOMELESSNESS

# 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](mailto: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