



Stocks and Mutual Fund Donation Form

Important Information:

- Name of Account: Agua Hedionda Lagoon Foundation
 - Lisa Rodman, CEO
 - 1580 Cannon Road, Carlsbad CA 92008
 - (760) 804-1969
 - lisa.rodman@aguahedionda.org
- Name of Broker: Charles Schwab & Co Inc
 - Rachel Ivanovich, Welath Advisor, EA
 - 2131 Palomar Airport Road, Suite 330, Carlsbad CA 92008
 - Phone: (760) 692-5190; Direct: (760) 692-5520
 - Email: rachel@wwmfinancial.com
- DTC #: 0164
- Account #: 7090-5072
- Tax ID #: 33-0411888

Steps:

Step 1: Complete the below Form.

Step 2: Send the completed form to your Broker and a copy to the AHLF.

- *If you would like our broker (Charles Schwab) to reach out to your broker, please call your broker ahead of time, to let them know a representative from the AHLF will be reaching out in regards to the gift of stock.*
- *When the gift of stock is complete, AHLF will send a tax-deduction letter to you.*

Name		
Street Address		
City	State	Zip
Email		
Does the Donor Wish to Remain Anonymous	Yes	No
Desired Date of Transfer		
What is the approximate value you would like to donate (in dollars and cents):		
Number of Shares		
Ticker Symbol (1 to 6 characters)		
Name of Security		
What is the name of your Broker?		
What firm is the Broker with?		
Firm Phone Number:		

As always, we recommend that you consult a tax professional with any specific questions.