



INSTRUCTIONS FOR ELECTRONIC TRANSFER OF MARKETABLE SECURITIES STOCKS, BONDS AND MUTUAL FUNDS

**Important: for transfer of non-marketable securities or paper stock certificates,
please contact the Coalition's Resource Development Office**

Your broker (including Charles Schwab), will be able to fulfill your instructions to transfer securities to the Coalition if you provide it the following information:

Our Broker: Charles Schwab
518 17th St.
Denver, CO 80202
(303) 260-5900

DTC transfer information:

Brokerage Firm: Charles Schwab
For Credit To: Colorado Coalition for the Homeless
Account Number: 877 552 8236
DTC Number: 0164
Taxpayer Identification Number: 84-0951575

Depository Trust Company (DTC) is a central securities repository where marketable securities are exchanged. The DTC is a member of the Federal Reserve System.

Please help us be efficient and ensure that securities transfers are posted properly by emailing us at Giving@ColoradoCoalition.org to let us know that a stock transfer is forthcoming. Be sure to include the number and type of shares, expected transfer date, purpose and any other relevant information. If you are working with a Coalition development officer, feel free to copy them on your message. Thank you.

Please Note: for tax purposes, the Gift Date is recognized as the date the shares enter the Colorado Coalition for the Homeless' clearing account at Charles Schwab brokerage. The gift will be valued on the average price (the mean between the highest and lowest selling prices) of the stock on the date received.

If you have questions or need additional assistance, please contact Christian Abeyta, Donor Services Manager at 303-312-9640 or CAbeyta@ColoradoCoalition.org.

The mission of the Colorado Coalition for the Homeless is to work collaboratively toward the prevention of homelessness and the creation of lasting solutions for homeless and at-risk families, children, and individuals throughout Colorado. The Coalition [advocates](#) for and provides a continuum of [housing](#) and a variety of [services](#) to improve the [health](#), well-being and stability of those it serves. The Coalition's comprehensive approach addresses the causes of homelessness, as well as the consequences, offering critical assistance to over 15,000 individuals and families each year.

Since its founding in 1984, the Coalition has earned state and national recognition for its integrated healthcare, housing and service programs.