



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

Step 1: Provide this information to your broker:

Coalition's Brokerage Firm: Fidelity Investments (800-343-3548)

For Credit To: Colorado Coalition for the Homeless

Account Number: Z50-669288

DTC Number: 0226

Taxpayer Identification Number: 84-0951575

Please note in transfer instructions: your name, address, phone, account number

Step 2: Notify Colorado Coalition for the Homeless

Please send an email to Giving@ColoradoCoalition.org with the following information:

Date of stock transfer

Number of shares

Name of stock

Correct spelling of your name

Your complete mailing address

Request that your gift be certified for the Enterprise Zone Tax Credit
(gifts of securities qualify for 12.5% tax credit.)

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 Fidelity Investments. 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 18,000 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.