

## **Incarnate Word Academy**

### **Stock Gift Instructions for Non-Profit. What do I need to know?**

Receiving shares: If a donor wants to give your organization shares (stocks, mutual funds, or other securities) from an outside firm, he or she needs to contact that firm to verify delivery instructions. In addition to following the firm's specific instructions, the sender may need to provide the firm with these details:

- Organization Name,
- Employer Identification Number
- Organization's Fidelity account number
- Fidelity's Depository Trust Company (DTC) number, which is 0226

Fidelity Investments  
Attn: TOA Receives  
PO Box 770001  
Cincinnati, OH 45277-0036

#### **Contact person:**

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Managing Director  
Cell: 330.608.7577

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Primary Address: 5700 Darrow Road, Suite 106 | Hudson, OH 44236

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