



## Gifts of Stock

Thank you for your interest in partnering with the John Austin Cheley Foundation (DBA A Thousand Summers) to provide the gift of camp to the amazing kids in our program through the gift of stock. You are providing them with an opportunity of a lifetime!

Giving stock through electronic transfer is the easiest method when a donor maintains holdings in a brokerage account. The Depository Trust Company, or DTC, is the clearinghouse for electronic security transfers. Each brokerage firm has a specific DTC number. When you wish to make a gift of stock, the broker holding the security will have a form for you to fill out where you will provide the following information.

**Account Name:** John Austin Cheley Foundation

**Account Number:** F10 0000030

**DTC Number:** 0571

**Custodian:** Oppenheimer & Co. Inc. (OPCO)

**Reference:** Donor's Name

It is very important that you alert Alyssa Street, Development Director, before the transfer so that we can make arrangements for the broker to receive the stock. We cannot accept a security if we do not have the Donor's name and contact information because Oppenheimer requires that information as well. At the same time, please indicate the purpose of the contribution, such as an annual gift, memorial gift, pledge payment or funds for a planned gift.

*Thank you; we look forward to working with you!*

As beneficiary of any gift, we would like to meet with you or speak with you over the phone to document your future wishes for the gift, to discuss any requests you may have related to privacy and your giving, and to appropriately thank you for your generous support.

Please contact Alyssa Street at 720-981-2532 x 100 or [alyssa.street@athousandsummers.org](mailto:alyssa.street@athousandsummers.org) if you would like to set up a meeting or if you have any questions.

Thank you again for your interest in supporting our mission!