



John Rinks

Director of Donor Advising

I advise successful, generous people
how to make smarter, tax-efficient gifts
to something they are passionate about
- Christian education at Lutheran High School -
now and in their will.

INSTRUCTIONS TO DONATE STOCK TO COLORADO LUTHERAN HIGH SCHOOL ASSOCIATION

Donating stock by transferring it to the school instead of selling it is a wise way to give a gift that also avoids capital gains tax and maximizes your income tax deduction. The school and association is a 501c3 charitable organization, EIN/TIN: 84-0455436. You will be mailed a receipt for tax purposes.

1. The donor must type a signed Letter of Authorization to the brokerage firm where the donor has the stock they desire to transfer. If the account is held jointly, then both husband and wife must sign the letter. The letter must include the following information:
 - Transfer to: Charles Schwab & Company, Inc.
 - DTC number: 0164
 - Account name: Colorado Lutheran High School Association
 - Account number: 1827 - 1990
 - Security: Name of the stock (company)
 - Number of shares: ###
 - Approximate value: \$\$\$
2. The donor should mail, fax, email or present the signed letter to their brokerage firm.
3. The donor should also mail, fax, email, or present a copy of the letter to Lutheran High School: "Attention John Rinks" so we can follow-up with the donor's firm if necessary.

The donation will be valued as of the day the shares are electronically withdrawn from the donor's account and deposited to the CLHSA account at Schwab. At that point it will be up to CLHSA to decide when the shares are to be sold, however, typically the shares will be sold immediately with no attempt made to time the market.

Thank you – and let me know if you have questions.

John Rinks
Director of Donor Advising,
Lutheran High School