

# STOCK GIFTS

## TRANSFER INSTRUCTIONS

The Camping & Education Foundation accepts gifts of appreciated stock and mutual fund shares. Such gifts may be tax-deductible, and do not incur capital gains. If you wish to make a stock gift, your broker should make a direct transfer to the Foundation's brokerage account below.

Please ensure that the transfer notice includes your name and mailing address. Once the transfer has been made, your broker should notify the Foundation. For year-end planning purposes, please note that gifts of mutual fund shares require additional processing time.

#### ONE CAPITAL MANAGEMENT, LLC

Patrick Bowen or Ryan Howard One Capital Management, LLC. 3075 Townsgate Rd, Suite 375 Westlake Village, CA 91361 (805) 409-8150 rhoward@onecapital.com

#### **ACCOUNT INFORMATION AT CUSTODIAN**

#### **PERSHING**

Title: Camping and Education Foundation DTC: 0443

Account #: T8C012087

### CONTACT US (513) 772-7479 office@campingedu.org campingedu.org





