Stock Transfer Information

Transferring long-term appreciated securities like stock, bonds, and mutual funds can make an even bigger impact! Many donors find they can increase their giving and realize significant tax benefits. Please consult your advisors and use the information below to arrange a transfer of assets. Also, please notify Homeward Pet of the upcoming transfer.

Contact Your Broker

You will need to contact your broker to arrange for a stock transfer. Please share the name of Homeward Pet's brokerage firm, Fortis Financial Group the account number, and DTC clearing number. Homeward Pet's investment advisor, Mike Boroughs, is also available to assist you.

Donation to: Homeward Pet Adoption Center
Address: 13132 NE 177th Place Woodinville, WA 98072
EIN: 91-1526803

Custodian: Charles Schwab
Account Number: 84624776
DTC Clearing Number: 0164

Brokerage Firm: Fortis Financial Group
Contact: Mike Boroughs
Email: mike@fortis.capital

Notify Us

Most stock transfers arrive anonymously, so please help Homeward Pet identify who is donating the shares. We would like to acknowledge your gift and provide any information that you might need for tax purposes. Please include the following information in your notification:

> My broker has been instructed to transfer (number) shares of (name of security) to Homeward Pet on (date) and I have requested that they forward my

name and contact information, (name, phone number, email address), for gift acknowledgement and verification purposes.

Please send your notification alerting us of the pending transfer to:

Homeward Pet Development Team
development@homewardpet.org