



**HOW TO DONATE APPRECIATED SECURITIES**

- 1) Contact Conne Bruce at the Fulcrum Foundation at (425) 922-0010 to notify us of your intended gift.
- 2) Contact your broker to inform them of your request. They will be able to help direct you on the paperwork that you need to present them to release your stock.
- 3) Email a copy of this form to the Conne Bruce, advancement director at Fulcrum Foundation, to [conne.bruce@fulcrumfoundation.org](mailto:conne.bruce@fulcrumfoundation.org)

Donor's Name \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Donating:	# of Shares	Company Name	Approx. Value (if known)
_____	_____	_____	_____

Donor's Broker's Firm \_\_\_\_\_

Donor's Account Executive \_\_\_\_\_ Phone \_\_\_\_\_

Fulcrum has an account with the following firm and broker. This account is **separate** from the Archdiocese of Seattle accounts.

Broker:

- D.A. DAVIDSON (#33369951, DTC 0361)  
Susann Joo, Senior Registered Associate  
(425) 467-2226  
PO Box 748  
Redmond, WA 98073

**The following is information you should give your broker regarding our accounts:**

All Accounts are under the name of: Fulcrum Foundation and Fulcrum Foundation's Tax Exempt ID# is 16-1616262.