



Stock Donation Form

DONOR INFORMATION

Donor Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone Number: _____ Email: _____

GIFT DETAILS

Cash Donation

A cash donation may be sent directly to Arlington Free Clinic or to our broker listed below.

Amount: \$ _____ Date: _____

--OR--

Stock Transfer

Name of Brokerage Firm: _____

Account #: _____ Account Title: _____

Stock Name: _____ Stock Symbol: _____

Number of Shares: _____ Date of Transfer: _____

Gifts of securities are sold immediately upon transfer.

ACCOUNT INFORMATION

Charles Schwab Financial Services

DTC #: 0164 Code #: 40

Arlington Free Clinic

Account #: 3268-9534

IRS Tax Status: 501(c)(3) - EIN #54-1671883

Signature: _____ Date: _____

QUESTIONS?

Financial Institution

Peter Zobel, CFP®
peter.zobel@creativeplanning.com
913-303-3059

Charitable Institution

Clare Hernandez
chernandez@arlingtonfreeclinic.org | 571-569-3573

Diana Namugenyi
dnamugenyi@arlingtonfreeclinic.org | 571-569-3576