

## Stock Donations - **Maximum Benefit To Donor**

### **Option 1 (Online): E\*TRADE to Merrill Lynch**

**For Detailed Steps of Option-1, Go to Page-2**

URL: <https://us.etrade.com/e/t/plan/charitable donations>

Account Name / Charity Name: **CRESCENT ACADEMY**

Receiving Firm Name: **Merrill Lynch (8 Digit Account Number)**

Account Number: **27202244**

DTC/Clearing Number: **0671**

### **Option 2 (Phone): Calling E\*TRADE**

Call: **+1 (800) -387-2331**

Account Name / Charity Name: **CRESCENT ACADEMY**

Receiving Firm Name: **E\*TRADE**

Account Number: **5146-2453**

*For information on stocks please contact*

**Imran Khan**

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P: **(347)-820-5977**

*For donation confirmation and tax receipt please contact*

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## Option 1 (Online): E\*TRADE to Merrill Lynch

Step 1

Go to  
Transfers -> Other Services ->  
**Make a charitable donation**

The screenshot shows the E\*TRADE website interface. At the top, there is a market data bar with DOW at 28,894.50 (up 307.60, 1.08%), NASDAQ at 11,894.32 (up 314.37, 2.71%), and S&P500 at 3,539.02 (up 61.89, 1.78%), as of 12:54PM ET. The main navigation bar includes the E\*TRADE logo and links for Accounts, Trading, Markets & Ideas, Stock Plan, and What We Offer. A secondary navigation bar lists Complete View, Portfolios, Watch Lists, Orders, Balances, Transactions, Banking, Transfers (highlighted), Tax Center, Documents, and Dividend Reinvestment. The main content area is titled 'Transfers' and has sub-tabs for Transfer, Activity, External accounts, and Other services (underlined). Below this, there is a grid of 12 service tiles, each with an icon and a label. The 'Make a charitable donation' tile is highlighted with a light gray border. The tiles are: Request an IRA distribution (umbrella icon), Pay a bill (envelope icon), Make a charitable donation (gift icon), Deposit checks (checkbook icon), Request a check (check icon), Order a check book (bank building icon), Request a debit card (piggy bank icon), Request a stop payment (speech bubble with exclamation mark icon), Set up a direct deposit (check icon), Set up Automatic Investing (dollar sign with circular arrows icon), and Transfer investments within E\*TRADE (transfer icon).

Step 2

Click **Donate**

DOW 28,892.21 ▲ 305.31 (1.07%) NASDAQ 11,892.51 ▲ 312.57 (2.70%) S&P500 3,538.72 ▲ 61.59 (1.77%) as of 12:55PM ET 17 Customer

**E\*TRADE** Accounts Trading Markets & Ideas Stock Plan What We Offer Symbol, company, or key

Refresh October 12, 2020 12:55 PM

**i** Important donation deadlines  
To ensure your mutual fund or options charitable donation is processed in 2019, complete your request before December 13.  
To ensure your stock or bond charitable donation is processed in 2019, complete your request before December 20.  
For any requests received after the listed deadlines, we will make our best effort to process them in the 2019 tax year.

### Do well by doing good

Donating shares to charity can help make the world a better place, and you may qualify for tax deductions along the way.

**Donate**

[Donate from a retirement account](#)

### Why donate shares?

<b>Qualify for a tax deduction</b> Charitable donations may be tax deductible if you meet certain requirements. <a href="#">i</a>	<b>Avoid capital gains taxes</b> You're not required to pay capital gains taxes on donated shares.	<b>Maximize your donation</b> Because you don't pay capital gains taxes, donating shares can help your money go further.
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### How to donate

Donating online is quick and easy.

- 1**  
Select the account from which you want to donate shares
- 2**  
Choose a charity with a mission you're passionate about
- 3**  
Select which shares you'd like to donate. We'll handle the rest!

**Get started**

[Use paper form instead](#)

Step 3

Select a account to donate stock



Call 800

Select account

Add charity

Donate

Confirm

### Select account

Select an account to make a charitable donation. Not all accounts may be eligible for donations.

One or more accounts have no available shares to donate.



Stock Plan account (QCOM)	Account value	Available to donate ⓘ	Select
[REDACTED]	[REDACTED]	[REDACTED]	Select



[Donate from a retirement account?](#)

Step 4

Click on "Add manually"



Call 800

Select account

Add charity

Donate

Confirm

### Add charity

Add a charity by selecting from a list of popular charities.

Add

Can't find your charity?  
[Add manually](#)

#### My charities



By providing access to pre-populated list of organizations, E\*TRADE does not recommend, endorse, sponsor or declare that such organizations are tax-exempt pursuant to Section 501(c)(3) of the Internal Revenue Code. It is your responsibility to determine the tax consequences resulting from your contribution to the selected organization.

#### Research charities

Click on the following links for general and educational information about certain charitable organizations. It is not intended to be, and should not be construed as, legal or tax advice. E\*TRADE does not provide legal or tax advice.

- [Guidestar](#)
- [Givingcompass](#)
- [Charity Navigator](#)
- [Give](#)

Step 5

Add charity manually

Charity Name:  
**CRESCENT ACADEMY**

Receiving Firm Name: **Merrill  
Lynch (8 Digit Account  
Number)**

Account Number: **27202244**

DTC/Clearing Number: **0671**



Call 800-387-2331

Step 2 of 5: Add charity

Add charity manually

Enter your charity and receiving firm, and we'll handle the rest. If you can't find your receiving firm, you can use our [Charitable Donation Form](#).

Charity name

CRESCENT ACADEMY

Receiving firm name

MERRILL LYNCH / MERRILL EDGE

Receiving account number

27202244

Receiving firm DTC number

0671

Save

Cancel

Step 6

Click "Donate" next to  
**"CRESCENT ACADEMY"**



Call 800-387-23

Step 2 of 5: Add charity

### Add charity

Add a charity by selecting from a list of popular charities.

Add

Can't find your charity?  
[Add manually](#)

#### My charities

Crescent Academy  
(Account #: 27202244)



Donate

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Step 7

Select the stocks and quantities that you would like to transfer. Then click **Review** at the bottom of the page.

**E\*TRADE** Call 800-838-0908

Select account | Add charity | Donate | Confirm

Refresh as of 10/12/20 at 01:37PM ET

Stock Plan QCOM [REDACTED]

Last QCOM Price: \$127.05 | Today's Change: \$2.18 (1.75%) | Volume: 4.38M

Transferable shares To: Crescent Academy (Account #: 27202244)


<input type="checkbox"/>	Date acquired ▲	Benefit type	Transferable qty. Ⓞ	# of shares to donate	Est. donation Ⓞ	Est. cost basis Ⓞ	Est. market value
<input type="checkbox"/>	1/00/2015	Restricted Stock	[REDACTED]	1	\$127.05	\$49.62	[REDACTED]

Total shares to transfer: 1 | Est. donation: \$127.05 Cancel **Review**



Step 8

Review your donation and click **Confirm**

Call 800-387-2333

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Step 4 of 5: Review

### Review your donation

From: (QCOM) - 2844

To: Crescent Academy (Account #: 27202244)

Type	Symbol	# of shares	Est. cost basis	Est. donation
Restricted Stock	QCOM	50	\$85.62	\$9,310.00
<b>Total donation</b>		<b>50</b>		<b>\$9,310.00</b>

You may be able to deduct your charitable donation from your taxable income. However, the amount you can deduct (if any) depends on the recipient organization's status as a tax-exempt organization, your income during the donation year, the state you live in, whether you itemize deductions, and how long you've owned the shares you're donating. Make sure you speak to an attorney or tax professional about your specific situation.

Donated shares are transferred in-kind and the final value of a donation will depend, among other things, on the time it takes the charity's broker-dealer to process a deposit.

By clicking on "Confirm", I authorize E\*TRADE Securities to irrevocably transfer the above listed security(ies) from my E\*TRADE account to the designated individual or charitable organization listed above. Shares will be transferred in-kind and are not to be liquidated. I hereby release and discharge E\*TRADE and its affiliates from any liability or claims in connection with the aforementioned instructions and agree to indemnify and hold E\*TRADE harmless against any losses from any action, claim, or demand of any person based upon E\*TRADE acting under these instructions.

Confirm

Step 9

1. Save your confirmation.
2. Notify **CRESCENT ACADEMY** to track your donation.

Contact Info

**Imran Khan**

E: [darululoomsd@outlook.com](mailto:darululoomsd@outlook.com)

P: **(347) 820-5977**



Call 800-387-2331

Step 5 of 5: Confirmation

✓ Thank you!

We've received your donation request. Please print this page to keep for your reference.



From: (QCOM) - 2844

To: Crescent Academy (Account #: 27202244)

Type	Symbol	# of shares	Est. cost basis	Est. donation
Restricted Stock	QCOM	50	\$85.62	\$9,310.00
<b>Total donation</b>		<b>50</b>		<b>\$9,310.00</b>

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Donated shares are transferred in-kind and the final value of a donation will depend, among other things, on the time it takes the charity's broker-dealer to process a deposit.

Please allow a few days for the receiving charity to process your donation. You can check the [status](#) of the request (Reference number: 22126740738881), or go back to [Stock Plan account](#).

[Make another donation](#)