



Making Donations of Stock Shares

OPERATION MOBILIZATION USA

Operation Mobilization USA (OM) is happy to receive gifts of stock shares of publicly traded companies. In order to do this, please instruct your broker to transfer the shares to OM's broker as follows:

Wells Fargo Advisors
DTC # 0141
Account # 4181-5468
Phone: 503-603-2141
Broker: W. Todd Frye

Account Name: Operation Mobilization USA
OM's Tax ID: 22-2513811

When you ask your broker to transfer the stock, please go to the following link:

<https://www.omusa.org/ways-to-give/#other-ways>

and under STOCK GIFT fill out the form and submit so we will know who the stock is from, name of stock, and how to designate your gift.

OM will send you a letter acknowledging your gift, including the name of the stock, number of shares, designation and the date OM received the stock into its account. It is OM's general policy to sell the stock shortly after the gift is made.

OM will not report value, which is standard practice for gifts-in-kind. Please consult your tax advisor for deductibility and record keeping.

Any questions can be emailed to marianne.hazen@om.org or by calling 770-692-5126.

Per OM USA Board policy, OM USA accepts gifts subject to donor designations. However, in accordance with IRS requirements, all gifts are given to and must be treated as belonging fully to Operation Mobilization and are subject to its control. The IRS requires that OM have the power to modify any restriction or designation if, in its sole judgment, such restriction becomes, in effect, unnecessary, incapable of fulfillment or inconsistent with the charitable purpose of Operation Mobilization.