



Stock Transfer Instructions

Donating long-term appreciated securities, including stocks, bonds and mutual funds, is a tax-wise way to support Oaks Park. In addition to avoiding the capital gains tax you would incur if you sold the assets, your donation is eligible for a full fair-market-value charitable contribution income tax deduction.

To make a gift of securities or mutual funds:

Instruct your broker to transmit gifts to:

Charles Schwab
DTC clearing: #0164
DTC code: 40 (free delivery)
Account #9658-9083
Account Name: The Oaks Park Association

Please instruct current custodian to notify Joshua Goldstein at 503-206-4284 or jgoldstein@oakspark.com prior to transfer so we can credit you appropriately when we receive your generous gift.

For physical certificates, please mail certificates and stock powers to:

Oaks Park Association
Attn: Development
7805 SE Oaks Park Way
Portland, OR 97203

Oaks Park Association Tax ID No. 93-0825821

Oaks Park Association, a 501(C)3 Non-Profit Organization
7805 SE Oaks Park Way Portland, Oregon 97203 503-233-5777