

If a member is *donating stock from another brokerage firm*, they need to note the following:

- Security name and/or ticker symbol or CUSIP#
- Number of shares
- Receiving firm name: TD Ameritrade
- Receiving firm DTC#: 0188 (may not be required)
- Receiving firm account name: Avondale Bible Church
- Receiving firm account #: 255-259304

If a member is *donating cash or stock from their regular (taxable) TD Ameritrade account*, they need to fill out an Internal Transfer Form (see attached).

- Section 1
 - From: their account # and account title
 - To: account # 255-259304 | account title - Avondale Bible Church
- Section 2
 - If cash, check appropriate box, note dollar amount
 - If stock, check appropriate box, list Symbol/CUSIP and number of shares
- Section 3
 - Skip
- Section 4
 - All registered owners of the account must sign and date

If a member is *donating cash from a Traditional IRA TD Ameritrade account* they need to fill out an IRA Distribution Request Form (see attached). {Note: A similar form would need to be filled out if coming from a different firm.}

[This example is for donating all or part of a Required Minimum Distribution (RMD). For a donation from an IRA account to be considered tax deductible (i.e. not added to personal income for tax purposes) it must be done by December 31st.]

- Section 1
 - Account Owner Information
- Section 2
 - A. check Traditional IRA
 - B. check Normal Distribution
- Section 3
 - check Required Minimum Distribution
 - check Partial Distribution (even if it's the full amount of the RMD) and note the dollar amount
 - most likely, check One-time distribution
- Section 4
 - check Charitable Donation of Securities (Note: In this case "cash" is the asset - future forms will make this more clear)
 - Receiving Firm: TD Ameritrade
 - DTC Number: 0188 (may not be required)
 - Receiving Account Name: Avondale Bible Church
 - Receiving Account Number: 255-259304

- Asset Description and/or Stock Symbol: Cash
 - Number of Whole Shares: note same dollar amount as in Section 3
- Section 5
 - check Please withhold taxes from my distribution at a rate of: **0** %. [Note: This is very **important**. If it is not marked, 10% will automatically be taken out for taxes.]
- State Withholding Election (this may not be needed for Washington residents.)
 - I declare my permanent state of residence is (state): WA
 - check I elect NOT to have state income tax withheld.
- Section 6
 - most likely, not applicable.
- Section 7
 - sign and date