



HOW TO CONTRIBUTE SECURITIES TO CLEARWATER CAMP FOUNDATION, INC.

A donation of appreciated securities can generate substantial benefits for the donor as well as for Clearwater Camp. Generally, if the donor has owned the donated security for over one year, the income tax deduction available is the fair market value of the securities rather than its original cost to the donor, and the donor will pay no capital gains tax on the difference between the original cost (the “basis”) and the fair market value. Neither will Clearwater Camp Foundation, Inc., because it is a non-profit, 501(c)(3) organization. Limitations on the amount of the donor’s deduction might apply depending on the donor’s adjusted gross income. *Please consult your tax advisor and/or IRS Publication 526, Charitable Contributions, to determine the amount of your charitable deduction for donating appreciated securities to the Clearwater Camp Foundation.*

There are two principal ways to transfer securities to Clearwater Camp Foundation, Inc.: by electronic transfer, or by mailing the physical stock certificates.

ELECTRONIC TRANSFER OF SECURITIES

This method is the most popular and most efficient way to transfer securities to the Foundation. It can be used when your stock is held in a brokerage account, where you do not have physical possession of the stock certificates. Instead, the stock is held in so-called “street name”, and you receive a statement showing your ownership of the stock very similar to a bank statement. An electronic transfer is much more convenient and less costly than the physical transfer of shares.

If your stock is held by a broker, notify the broker that you wish to make a gift of securities to Clearwater Camp Foundation, Inc. Your broker will need written authorization from you before making the transfer. Be sure to identify the name of the stock that you want to transfer and the number of shares. Attached is a **stock transfer authorization form** you can use to inform your broker.

Once you have authorized the transfer, please either scan and email or fax a copy of your letter of authorization to Nancy Neumann, the Treasurer of Clearwater Camp Foundation, Inc., at boulderneumann@gmail.com or 303/416-4223 (fax), so the Foundation can track the delivery and receipt of shares.

PHYSICAL STOCK CERTIFICATE TRANSFER

If your stock is not held at a broker, and instead you have **physical possession** of the certificates, you will need to mail the certificates with a cover letter and an executed stock power form to the Foundation’s broker.

Attached are a *sample letter* to use for transfer of stock held by the donor in physical (certificate) form, and a blank *stock power form*. In one envelope send this letter together with the unendorsed stock certificate(s) via registered mail to the broker for Clearwater Camp Foundation, Inc., (Edward Jones, Attn: Andrew Boles, Two Shunpike Road Suite 22, Madison, NJ 07940).

Please send Clearwater Camp Foundation, Inc. a copy of the letter to alert us to track the receipt of shares to Clearwater Camp Foundation, Inc., P.O. Box 152, Minocqua WI 54548.

In a separate envelope mail the signed stock power form to Edward Jones at the same address. The stock power should be signed in blank—meaning that no other information should be entered on the stock power form other than the signature(s), which should exactly match the name(s) appearing on the stock certificate. In the case of a gift of stock of more than one company, a separate stock power should be signed for each company. On the other hand, multiple certificates for the same company require only one stock power.

Whether you send securities electronically or physically, it is the Foundation's policy not to hold on to these. As soon as practicable after receiving your gift the Foundation's broker will liquidate (sell) the securities. The gross proceeds of sale (before brokerage fees) will be recorded as the value of your contribution to the Foundation. However, for your tax purposes the gift will normally be valued using the average of the opening and closing prices of the shares on the day of receipt. Because of market fluctuations this value may not be exactly the same as the value realized.

You will receive an acknowledgment letter from the Foundation that will include the gift date, the gift description (e.g., 100 shares of ABC Corporation) and the value of your gift recorded by the Foundation as well as the value of the gift for your tax purposes. (Nevertheless, please consult your financial/tax advisor for guidance on your personal tax circumstances and assistance with the I.R.S. Form 8283: Noncash Charitable Contributions.)

Should you have any questions, please do not hesitate to contact either the Foundation's Treasurer, Nancy Neumann, at 720/308-4110 or boulderneumann@gmail.com, or our broker: Andrew Boles or Robin Richmond at Edward Jones, 800-401-2377.



P.O. Box 152
Minocqua, WI 54548

STOCK TRANSFER AUTHORIZATION

PERSONAL INFORMATION:

Name(s) _____

Mailing Address _____

Phone Number (with area code) _____ Email _____

STOCK INFORMATION (Donor's transfer agent or broker)

Name of Firm/Fund _____

Contact Name _____ Phone Number _____

Your Account Name (if different from above) _____

DELIVERY INSTRUCTIONS

For more information contact Andrew Boles or Robin Richmond at Edward Jones 800-401-2377.

Please deliver the following assets:

Company Name and/or Symbol _____

Number of Shares _____

TO: **Edward Jones**

Via DTC-Clearing Number: 0057

For Further Benefit of **Clearwater Camp Foundation, Inc.,**

Account #313-08831-1-3, Tax ID #43-2024465

SIGNATURE(s) _____

(Must be signed by all account holders)

Date _____

DONOR MAILING INSTRUCTIONS:

Original To: Donor's Transfer Agent (Broker)

Copy To: Treasurer, Clearwater Camp Foundation, Inc.

PLEASE EITHER SCAN AND EMAIL OR FAX A COPY OF THIS FORM TO NANCY NEUMANN, THE TREASURER OF CLEARWATER CAMP FOUNDATION INC., AT boulderneumann@gmail.com or 303/416-4223 (fax), SO THE FOUNDATION MAY TRACK THE RECEIPT OF SHARES

FORM OF LETTER TO USE TO TRANSFER PHYSICAL STOCK CERTIFICATES

Edward Jones
Attn: Andrew Boles
Two Shunpike Road Suite 22
Madison, NJ 07940
[tel: 800-401-2377]

Date

Dear Sir:

Enclosed is/are (a) certificate(s) for (number) shares of (name of company) stock, which I/we am/are donating to **Clearwater Camp Foundation, Inc., at Edward Jones Account # 313-08831-1-3.**

Under separate cover, I/we am/are sending a signed stock power to transfer the stock.

Please acknowledge receipt of these securities.

Sincerely,

Signature(s)
Name of Donor(s)
Enclosure: Stock Certificate(s)

Copy:

Treasurer, Clearwater Camp Foundation, Inc.
P.O. Box 152
Minocqua, WI 54548

EdwardJones

Account Number: 313-08831

Destination: SECURITY RECEIVE

Customer: CLEARWATER CAMP FOUNDATION, INC.

IR Number: 313033

Date: _____

IRREVOCABLE STOCK OR BOND POWER

Do not complete this portion:

FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign and transfer to

_____ shares of _____ stock of _____

represented by the Certificate(s) No(s) _____

_____ inclusive,

standing in the name of the undersigned on the books of said Company.

_____ bonds of _____ in the principal

amount of \$ _____, No(s) _____

_____ inclusive,

standing in the name of the undersigned on the books of said Company.

The undersigned does (do) hereby irrevocably constitute and appoint Edward**Jones** attorney to transfer said stock or bond(s), as the case may be, on the books of said Company, with full power of substitution in the premises.

Dated _____

SIGNATURE OF OWNER

SIGNATURE OF CO-OWNER

SIGNATURE GUARANTEED