Sunnyside High School Alumni Scholarship Fund

Instructions for Donating Stock & Mutual Funds

Thank you for supporting the **Sunnyside High School Alumni Scholarship Fund**! Donating appreciated stock or mutual funds is a highly tax-efficient way to make an impact. By transferring securities directly to our organization, you can **avoid capital gains taxes** while maximizing your charitable contribution.

Because traditional banks do not hold equities, all stock or mutual fund transfers must go directly through our institutional brokerage account at **Vanguard**. We maintain three separate accounts to ensure your gift goes exactly where you intend it. Use the information below when instructing your stockbroker.

Electronic Delivery (DTC) Transfer Details:

- **Receiving Institution:** Vanguard Brokerage Services
- **DTC Clearing Number:** 0062
- **Account Name:** Sunnyside High School Alumni Scholarship Fund
- **Vanguard Account Number:** 58369395

■■ IMPORTANT NOTE FOR DONORS: Because brokerage transfers often arrive as "blind" entries without your name attached, please notify us by email or phone as soon as you instruct your broker. Please explicitly state your name, the stock name, the number of shares, and reference Account Number 58369395, so we can track your gift and provide an IRS-compliant tax acknowledgment letter.

- **Email Notification:** SHSAlumniFund@gmail.com
- **Phone Notification:** (425) 923-6234

Frequently Asked Questions

Do I need a Vanguard account to donate stock?

No. You can initiate a transfer from **any brokerage firm** (such as Fidelity, Charles Schwab, E*TRADE, Robinhood, etc.). Your broker will use our Vanguard details to send the shares.

What types of investments can I donate?

We accept most **publicly traded stocks, Exchange-Traded Funds (ETFs), and widely held mutual funds** (including non-Vanguard funds).

Are there any investments you cannot accept?

Yes. Due to platform restrictions, we cannot directly accept **cryptocurrencies, real estate, privately held stock, or restricted/penny stocks**.

How do I get a tax receipt for my stock donation?

Once the shares clear into our account, we will send you an official tax acknowledgment letter to your email or mailing address displaying the date of the transfer, the name of the stock, the number of shares, and the designated fund.