



# One World One Family Foundation

## Transfer of non-Retirement Shares to One World One Family Foundation

One World One Family Foundation accepts donations of equities through Fidelity Brokerage. One World One Family Foundation is an IRS approved 501(c)(3) Corporation

**Why does donation of equities make sense:** Donating appreciated shares can reduce tax burden. Benefits of donating shares: <https://www.youtube.com/watch?v=2v-NVoRiTd4>  
One World One Family Foundation does NOT provide tax guidance. Consult your CPA

### 1. Who are the shares coming from – the Donor’s account details:

• Account Owner/Donor’s Name:	<name of donor>
• Account Number of Donor:	<account number>

### 2. OWOF Account Details to transfer into:

• Receiving Firm’s name:	<b>Fidelity Investments</b>
• Receiving Firm’s DTC number:	<b>0226</b>
• For the Benefit of:	<b>One World One Family Foundation</b>
• Receiving Firm’s Account number:	<b>Z27782517</b>

### 3. Receiving Firm's address:

Attn: TOA Receives PO Box 770001, Cincinnati, OH 45277-0036
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### 4. Additional Details / Comments to be included:

Tax ID/EIN: 99-3317535	From: <donors-email-id@xyz.com>
Address:	3654 THORNTON AVE, # 504, FREMONT, CA 94536

### 5. Shares to be donated:

Equities to be transferred:	<Stock symbol>	Number of Shares:	<###>
Acquisition Date:	<MM/DD/YYYY>	Acquisition Cost:	<total cost>

### Notes:

1. DTC for brokerage is similar to routing number for wires. For Fidelity = 0226
2. Email address is essential to receive receipt. Brokerage **does not** share email address.
3. Check with your brokerage for the form to gift shares.



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## Sample Brokerage Links:

### **Fidelity:**

[https://www.fidelity.com/bin-public/060\\_www\\_fidelity\\_com/documents/applications/Transfer-Shares-Gift-Nonretirement.pdf](https://www.fidelity.com/bin-public/060_www_fidelity_com/documents/applications/Transfer-Shares-Gift-Nonretirement.pdf)

### **Vanguard:**

<need to find the URL>

### **Charles Schwab:**

<need to find the URL>

