



## DONATION OF SECURITIES FORM

**Thank you for your gift to The Village Family Services.**

Please fill out the information below:

\_\_\_\_\_  
Name & Type of Securities (ex: IBM common stock)      Number of shares:      Date of Transfer

\_\_\_\_\_  
Donor's Name

\_\_\_\_\_  
Broker's Name

\_\_\_\_\_  
Donor's Street Address

\_\_\_\_\_  
Broker's Company

\_\_\_\_\_  
Donor's City/State/Zip

\_\_\_\_\_  
Broker's Phone Number

\_\_\_\_\_  
Donor's Phone Number

**The Village Family Services broker contact information is:**

Daniel C. Venegas, AIF®

Qualified Plan Specialist

Financial Consultant



Wealth Management Strategies

2050 Main Street, Suite 520

Irvine, CA 92614

[www.WMSwealth.com](http://www.WMSwealth.com)

P: 949.833.5763    F: 949.833.5810

CA Insurance License #0812390

<https://www.linkedin.com/in/danielcvenegas>



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The Village Family Services account number with Wealth Management Strategies is: 1531-5472

For electronic transfers, our Depository Trust Company (DTC) number is: 0075

(This is the most secure and cost-effective way to process your gift.)

The Village Family Services **tax identification number** (FEIN) is: 95-4625826

After The Village Family Services receives this form and our broker confirms the donation of securities, the development staff will issue an official acknowledgment letter to the donor. This letter will indicate the number and type of shares received and the date the stock was converted into a gift (day when record ownership of stock was transferred to The Village Family Services or the stock was unconditionally delivered to The Village Family Services).

Stock information can be mailed to The Village Family Services, ATTN: Lauren Hall, 6736 Laurel Canyon Blvd., Suite 200, North Hollywood CA 91606, emailed to [LHall@thevillagefs.org](mailto:LHall@thevillagefs.org) or called in to 818.755.8786

All contributions are tax-deductible to the fullest extent provided by law. Every effort will be made to sell non-marketable securities as quickly as possible. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift. The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules.

Please contact Lauren Hall at [LHall@thevillagefs.org](mailto:LHall@thevillagefs.org) or 818.755.8786 for any questions.

*The Village Family Services is a registered 501(c)3 non-profit organization. Contributions are tax-deductible as permitted by law.*