

Contribute to the CAIR Foundation - Donation Form

Contributions to the CAIR Foundation brokerage account can include appreciated stocks, and mutual funds. **Note:** Mutual fund donations require special handling; please do not submit unless you have confirmed with CAIR.

Note: donating shares held less than a year may impact your deduction. Please consult with your tax advisor.

If making a check deposit: Complete Sections 1, 2, and 4.

If making a securities transfer: Complete Sections 1, 3, and 4.

Section 1. Your Information

Please complete the below to ensure that CAIR Foundation provides you with a donation receipt:

Your Name: _____ Social Security Number: _____

Full Mailing Address: _____

Telephone Number: _____ Email Address: _____

Section 2. Complete if sending a check

Check Enclosed \$ _____

Make your check payable to: **Folio Investments FBO CAIR Foundation (RK2355300R)**

8180 Greensboro Drive, 8th Floor

McLean, VA 22102

Section 3. To transfer stocks or mutual funds held at other Financial Institutions

NOTE: Securities must be marketable and in most cases penny stocks are NOT accepted.

I will initiate the transfer of assets by:

- Contacting my financial institution directly to request the required procedures and forms and providing them the delivery instructions in Section 5 below.
- Using a separate form for *each* transfer from separate financial institutions.
- Faxing a copy of this signed form to Foliofn Investments **703-649-6288**.

Name of Financial Firm Holding Assets: _____ Telephone Number: _____

Name on Account(s) _____ Account Number: _____

Financial Firm Address: _____

Below specify assets to be transferred to CAIR Foundation. We hereby authorize Foliofn Investments to accept the below security transfers into the account identified in Section 2 above.

