

A donor can initiate a donation from their own brokerage firm. However, the donor must notify Stock Donator in advance of the transaction using the non-automated form in order for the donation to be processed correctly.

To ensure the stock donation goes to OSOT-America, the donor must send written authorization to Stock Donator. Stock Donator represents many organizations, and they need to match the donation to the right organization when they receive the donation.

If a donor simply pushes the donation to Stock Donator account **without** notifying them, they won't have sufficient instructions to process the donation.

Stock Donator is only able to route a donation to OSOT-America in two ways. (1) If the donation was initiated online or if the donor provided Stock Donator notification of the donation by using the Non-Automated Stock Donation Initiation Request form.

To initiate a non-automated donation of stock to OSOT-America, please fill out the top part of the form and select OPTION 1. It should take no longer than 2 minutes.

Once complete, please email the form to [communications@stockdonator.com](mailto:communications@stockdonator.com) and to [info@osotamerica.org](mailto:info@osotamerica.org) Stock Donator will have everything they need to match the donation to OSOT-America and they will liquidate the funds and complete the transfer.



**NON-AUTOMATED STOCK DONATION INITIATION REQUEST**

Date:	
Donor Name(s):	(Donor)
Donor Email:	
Donor Home Address:	
Donor Phone:	

Please accept this letter as a request that the Donor named above would like to transfer \_\_\_\_\_ shares of \_\_\_\_\_ stock, with a stock ticker symbol of \_\_\_\_\_ from the Donor's stock account as a donation to the following Stock Donator Member Organization:

\_\_\_\_\_

If the donor wishes to remain anonymous, please check this box:

-----**SELECT ONE OF THE TWO OPTIONS BELOW**-----

**OPTION 1:** Donor will separately request that Donor's brokerage firm initiate the transfer to the Stock Donator Member Organization account listed below.

Brokerage Services DTC#	0226
Brokerage Firm:	Fidelity Investments
Account Name:	Stock Donator Inc.
Account Number:	Z49-668052
Address:	Attn: TOA Receives PO BOX 770001, Cincinnati OH 45277-0366
Phone:	(800) 343-3548

**OPTION 2:** Donor is requesting that Stock Donator initiate the transfer for the Donor from the account listed below to the Stock Donator Member Organization account listed in **Option 1**. Donor hereby represents that Donor is authorized to, and is requesting their brokerage firm listed below to initiate a transfer and of the shares of stock listed above to the Organization's brokerage account listed in **Option 1**:

(A) ACCOUNT INFORMATION (Only fill this part out if you selected "OPTION 2")

Account Name / Title	
Account Number	

(B) BROKERAGE INFORMATION (Only fill this part out if you selected "OPTION 2")

Brokerage Name	
Brokerage Address	
Brokerage Phone	
Brokerage Fax	

Donor Signature:	
Donor Name:	

**When complete, email the form to: [communications@stockdonator.com](mailto:communications@stockdonator.com) or Fax: (310)382-2086**