



4200 W. Diversey Ave. • Chicago, IL 60639

773-777-9884 • www.porchlightmusictheatre.org

Donating Via Stock Transfer

Thank you so much for your interest in making a gift to Porchlight Music Theatre Chicago via a transfer of stock from your brokerage account to our Charles Schwab account. Following are the steps to take:

1. Contact your investment brokerage to obtain the appropriate transfer form. You may be able to go online and print the form yourself, or you may have to or call your broker to have them send you the form.
2. Complete the broker's form.

Porchlight's information for completing the form:

Receiving Firm:	Charles Schwab
Receiving Account Name:	Porchlight Music Theatre
Receiving Account #:	6086-9196
DTC # for Schwab:	0164
Account Contact:	Jean Lukow

The basic information you will provide:

Name of shares being transferred
Stock Symbol for shares being transferred
Number of shares being transferred

3. Fax or scan/email (as an attachment) the completed form to your broker. You can also mail via USPS, but it will add several days to the process. Best for security and expediency if the form is emailed or faxed to your broker.
4. You or your broker should then email Development Associate Kellie Buffington, kellie@porchlightmusictheatre.org, to apprise her that you are transferring X number of shares of Y company stock.
5. Porchlight will follow up with a confirmation once the shares arrive in the Porchlight account. And, we will send an official thank you and acknowledgement for tax purposes.

If you have any questions, please contact Kellie Buffington at kellie@porchlightmusictheatre.org.

THANK YOU!