



BAY AREA WILDERNESS TRAINING
A Fiscally sponsored project of
EARTH ISLAND INSTITUTE

STOCK DONATION INFORMATION

One important donation opportunity for both donors and Earth Island projects is appreciated stock. The donor gets to claim the full value of the stock (as of the date that it leaves his/her hands), and the donor avoids what may be very significant capital gains taxes on the appreciated value of the shares over their original acquisition value.

Bay Area Wilderness Training is a fiscally sponsored project of Earth Island Institute and our tax ID is 94-2889684. This is the organization ID (also known as Federal Identification Number/FIN or Employer Identification Number/EIN). Stock donors often might want a copy of Earth Island's 501(c)3 letter and a letter from Earth Island stating that BAWT is a fiscally sponsored project. For that, please [click here](#).

While Earth Island can handle physical shares of stock, it is far more complicated a process than to simply transfer shares directly to Earth Island's Schwab account:

- Account Name: **Earth Island Institute**
- Charles Schwab Account **#3024-7477**
- **DTC #164**

If you or your donors have further questions, or if the donation is an actual paper share certificate, please have them contact Earth Island's Ellen Manchester at 415-788-3666, ext. 137, or via e-mail at ellenm@earthisland.org and please cc: Roger Miller at roger@bawt.org

If you expect to be receiving a stock donation, **we must have the following information:**

1. the name of the security;
2. the expected number of shares;
3. when the transfer is expected to take place
4. the name and address of the donor

Our policy is to sell all shares as soon as they arrive in our account, once we've confirmed that they are in fact ours.

Attached you will find a standard stock donation template for donors to fill out. Please keep in mind that we are not allowed to place a value on the donation, since that is a matter between the donor and the IRS, based on information from the donor's broker.

Ellen Manchester
Development Associate
Earth Island Institute
300 Broadway, Suite 28

San Francisco, CA 94133
415-788-3666 ext. 137
ellenm@earthisland.org

DATE: _____

TO: Earth Island Institute
ATT: Ellen Manchester
300 Broadway, Suite 28
San Francisco, CA 94133
415-788-3666 ext. 137
ellenm@earthisland

RE: Gift of stock to Bay Area Wilderness Training, a project of Earth Island Institute

Dear Earth Island,

We have made the following unrestricted, charitable gift to Earth Island Institute for BAWT's work:

_____ shares of _____
(number of shares) (name of security) (symbol)

Please designate this gift to: Bay Area Wilderness Training, a project of Earth Island Institute

If this gift is on behalf of one of BAWT's Climbing for Kids climbers or for some other specific purpose, please note that here:

The stock will be transferred

FROM:

Your name: _____

Your brokerage company: _____

Your account #: _____

TO:

Broker: Charles Schwab

Account name: Earth Island Institute

Account #3024-7477

DTC #164

I understand that my gift is tax deductible within the limits of the IRS Code and with reference to my own tax situation. I also understand that I need to confirm with my broker the value of the shares at the time of transfer and that I will be sent an acknowledgement letter once the stock has been received into Earth Island's account.

Sincerely,

(Full name as it appears on my account) (Phone number) (Email)