



## **PathForward (Formerly A-SPAN)**

### **ACCEPTANCE OF DONATED STOCK / MARKETABLE SECURITIES**

PathForward solicits and accepts gifts that are consistent with its mission and that support its core programs, as well as special projects. Upon receipt of a stock or mutual fund share donation, it is the policy of this organization to liquidate stock and mutual fund shares immediately upon receipt.

An investment account is maintained with a minimum balance of cash or stock as required to facilitate the donation of stock to PathForward and liquidation of the stock. The maintenance of this account is the responsibility of the PathForward Finance Director in conjunction with the finance committee. Currently the account is held with Morgan Stanley and the following information needs to be given to the donor's financial advisor or account administrator in order for the transfer to take place.

**DTC # 0015**

**Morgan Stanley**

**Account Name: PathForward**

**Account Address: PO Box 100731, Arlington VA 22210 (703) 228-7809**

**Account #631-045306-629**

Proceeds from the sale of the stock are considered unrestricted contributed income unless the donor requests a restriction as a condition of the gift in which case procedures for accounting for restricted contributions will be followed.

For more information, please contact PathForward Sr. Director of Strategic Partnerships Liz Nohra at (703) 200-3425 or [lnohra@pathforwardva.org](mailto:lnohra@pathforwardva.org).