

HOW TO MAKE A STOCK OR MUTUAL FUND DONATION

If you would like to do so, here is how:

FOR A DONATION OF STOCK:

1. Please instruct your broker to deliver the stock shares to:
The National Capital Financial Group
Pershing LLC (DTC # 0443)
Account Name: PathForward Inc NPO
Account Number: 5AD-880566

2. It is vital that you notify PathForward of your transfer. Please contact, Liz Nohra at 703-200-3425 or Inohra@pfva.org, with the following information:
 - (a) Your name and phone number
 - (b) The name of your brokerage house
 - (c) The date the stock is to be transferred to PathForward's account
 - (d) The name of the stock and the number of shares you are transferring
 - (e) The approximate dollar value of the stock

FOR A DONATION OF MUTUAL FUND:

1. Please contact Lois Mastel, at the National Capital Financial Group at 202-546-9310 for instructions. Please note that every mutual fund transfer differs, depending on where the funds are held – ***and that it can take up to 2-3 weeks to affect a mutual funds transfer.***

2. It is vital that you also notify PathForward of your transfer. Please contact, Liz Nohra at 703-200-3425 or Inohra@pfva.org, with the following information:
 - (a) Your name and phone number
 - (b) The name of your brokerage house
 - (c) The date the stock is to be transferred to PathForwards's account
 - (d) The name of the stock and the number of shares you are transferring
 - (e) The approximate dollar value of the stock

If you have any questions about the donation, please call
Liz Nohra at 703-200-3425 or Inohra@pfva.org.