



## Gifting Securities to International Justice Mission

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**IMPORTANT:** Please note that when your financial institution sends your stock donation to IJM, they will not provide your name to IJM. In order for us to attribute the gift to you and provide you with a tax receipt, please email the information requested at the bottom of this sheet.

### Instructions for gifting securities to International Justice Mission

Donating securities that have appreciated in value to a charity such as International Justice Mission can be an extremely tax-effective way of giving. Usually, the donor will be able to take the full market value of the securities on the date they are transferred as an itemized deduction.

How you can make a gift of securities depends on where those securities are held. The following instructions are intended to make this process as easy as possible.

### DONATE STOCK:

Tell your broker that you wish to donate the securities to International Justice Mission. Instruct broker to transfer the securities to:

FBO (for the benefit of) International Justice Mission (EIN: 54-1722887)

- Brokerage House: Merrill Lynch, Pierce, Fenner & Smith Incorporated
- DTC Number: **8862** \*
- Account Number: **519-02512**
- Additional Information for Reference Field: **Donor Name**
- Address: Merrill Lynch, Pierce, Fenner & Smith Incorporated  
7501 Wisconsin Avenue, Suite 600W  
Bethesda, MD 20814

\* Limited broker portals use the Merrill Lynch DTC clearing number 0671 instead of 8862. Both DTC clearing numbers are acceptable, but 8862 is preferred.

**Donations received into IJM's stock gift account with Merrill Lynch after December 31st will be treated as a gift in the following calendar year for tax deduction purposes.**

**IMPORTANT:** When you have given these instructions for transfer, please notify IJM's Constituent Relations team at [donations@ijm.org](mailto:donations@ijm.org) providing the following:

- Number of Shares you are giving
- Company in which Stock is held
- Date of expected transaction

*For example: Transferring 40 shares in Coca-Cola on April 15th, 2023*

This will allow us to fully and accurately acknowledge your gift with a tax-deductible receipt.

**DONATE MUTUAL FUNDS OR OTHER SECURITIES:**

Please contact International Justice Missions Advisory Team with Merrill Lynch at (301) 215-4418 on business days between 9:00 AM - 5:00 PM EST for instructions.

Please have the following mutual fund information available when you contact Merrill Lynch:

- Ticker symbol and name of mutual fund
- Number of shares being gifted
- Broker information, including
  - Name of brokerage firm
  - Account number
  - Phone number of the institution delivering the shares
- Donor Name
- BIN Number

Note that donations of mutual fund shares can take between 3 to 4 weeks to settle to International Justice Mission's security donations account.

**Donations received into IJM's stock gift account with Merrill Lynch after December 31st will be treated as a gift in the following calendar year for tax deduction purposes.**

**IMPORTANT:** When you have given these instructions for mutual fund transfer, please email IJM's Constituent Relations team at [donations@ijm.org](mailto:donations@ijm.org) providing the following:

- Number of Shares you are giving
- Name of Mutual Fund & ticker symbol
- Date of expected transaction

*For example: Transferring 40 shares of BlackRock 20/80 Target Allocation Fund; ticker BACPX; on April 15, 2023*

This will allow us to fully and accurately acknowledge your gift with a tax-deductible receipt.

If you need an overnight mailing address for IJM or your brokerage requires a physical address, please contact IJM's Constituent Relations team at 703.465.5495 or [donations@ijm.org](mailto:donations@ijm.org) for this information.

For general questions regarding your donation of securities to IJM, please contact us:

**By email:**

[donations@ijm.org](mailto:donations@ijm.org)

**By phone:**

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