

Donating Stock or Mutual Funds to OWCF's Fidelity Investments Account

Receiving Firm Name: National Financial Services LLC

Receiving Firm DTC Number: 0226

Receiving Account Name: One World Children's Fund

Receiving Account Number: 670-768111

Important Notes: Stocks must be trade-able on a stock exchange.

In order to qualify for tax deductions, a stock position must have been held for at least one year. The donor should discuss the tax savings/consequences with his/her tax advisor.

Donating Mutual Funds That Need BINs

The delivering firm should fax a letter of instruction along with any written request they received from donor to Fidelity's mutual fund operations team, requesting the BINs to be established. The LOI can be faxed to 800-753-2050.

The letter of instruction must include:

- Delivering account number and registration
- Receiving account number and registration
- Positions being transferred
- Quantity of shares
- Delivering firm name
- Where to return the delivery instructions

Please email info@owcf.org to inform us what stock or mutual fund is being donated and approximately when the transfer will happen