

Intentional Legacy



Do you have an investment that's done so well you can't afford to sell it because of all the capital gains taxes you'd pay? Instead of donating money out of your pocket, you can donate those shares of stock to your favorite charity – who can cash it in without paying capital gains, and you STILL receive a tax receipt for the full value of the gift!!

Intentional Legacy is now able to accept investment transfers through the generosity of [Legacy Partners' Financial Group, LLC!](#)

How to initiate the investment transfer:

The investment transfer process is initiated by an individual, couple, or business contacting their investment account provider to request a transfer of a specific investment to Intentional Legacy.

1. In addition to identifying the specific investment and number of shares to be transferred, you will need to provide your brokerage firm with the following information:
 - Receiving firm name: Charles Schwabb
 - Receiving Firm DTC Number: 0164
 - Receiving Account Title: Intentional Legacy, Woodstock GA Attn: [project name]
 - Receiving Account Number: 2723-1252
2. In most cases, your investment account provider will need to send you a transfer form for you to authorize and return to them. Once they have received it back from you, the transfer usually takes place within the following 5-7 business days.
3. If there are fees involved with the transfer, which there are usually not, be sure to ask about how you can contribute enough from your account to cover those fees.
4. Send, Jordan Pease (jordan@intentionallegacy.org) an email including the following information immediately after filing the investment transfer with your investment management company:
 - Your name, phone number and email
 - The trading symbol for the investment being transferred
 - Number of shares being transferred
 - Date you initiated the transfer
 - Indicate if it is for a specific project

Please note that the initiation of the stock transfer is completely invisible to Intentional Legacy, so please alert Jordan via email that a transfer has been requested. Your investment company will contact you only with any issues related to the transfer, so it is helpful that Jordan be aware that a transaction is in-process. She can then check with Charles Schwabb to monitor the transfer and confirm receipt with you by phone or email when it has been completed.