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## Donation Instructions

Updated August 2023

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Thank you for supporting Telos! Our ongoing work depends on people like you, who share our vision of a world in which leaders and their communities claim the requisite drive, expertise, and relationships to effectively and relentlessly wage peace and ensure mutual flourishing for all peoples.

### You can make a secure donation by:

- Visiting our website at [telosgroup.org/donate](https://telosgroup.org/donate) to make an online contribution,
- Sending a check to Telos, P.O. Box 70872, Washington DC 20024,
- We can provide information for a wire transfer, *or*
- Donating securities or mutual fund shares (*see instructions on the following pages*)

Telos is a registered 501(c)3 nonprofit and all donations made from the United States are fully tax-deductible. Our EIN is 26-4269918.

*If you have questions or would like assistance, please email Carolyn Ebersole at [carolyn.ebersole@telosgroup.org](mailto:carolyn.ebersole@telosgroup.org)*

### **Instructions for Donating Securities**

***IMPORTANT:*** Please note that when your financial institution sends your stock donation to Telos, they will not provide your name. 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 The Telos Group**

Donating securities that have appreciated in value to a charity such as The Telos Group 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, without incurring any tax

on the gain represented by the difference between his or her cost and the current market value. How a gift of securities is made depends on where those securities are held. The following instructions are intended to make this process as easy as possible.

**For securities being held by a brokerage firm:**

Tell your broker that you wish to donate the securities to The Telos Group. Instruct your broker to transfer the securities to:

- Fidelity
- FBO The Telos Group (EIN: 26-4269918)
- Account number: Z40055616
- DTC routing number: 0226
- Telos Contact Name: Bradley Todd Deatherage
- Phone Number: 202-552-9661

\*For mutual shares, please see the following instruction page.

**IMPORTANT:** When you have given these instructions for transfer, please notify Carolyn Ebersole at [carolyn.ebersole@telosgroup.org](mailto:carolyn.ebersole@telosgroup.org) providing the following:

- Number of shares you are giving
- Company in which stock is held
- Date of expected transaction (i.e. 40 shares in Pepsi Co. transferred December 1, 2018)

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

**For mutual fund shares held directly in an account with the mutual fund group:**

Ordinarily, you will have to provide the mutual fund written instructions to make the transfer. The signature(s) of the account owner(s) on these instructions will have to be guaranteed by a bank or brokerage firm. Although requirements may vary among mutual fund sponsors, instructions along the following lines should be a good template:

[DATE]

I am (we are) the registered owner(s) of account number **[ACCOUNT NUMBER]**, holding shares of **[NAME OF FUND]**. I (we) hereby instruct you to transfer **[NUMBER OF SHARES]** of the Fund to an account in the following name:

The Telos Group  
P.O. Box 70872  
Washington, DC 20024

By directing you to make this transfer, I intend to make a charitable gift of these shares to The Telos Group. If you need further information to complete establishing an account for The Telos Group, please contact them directly.

Sincerely,

\_\_\_\_\_  
(signature of registered owner)

\_\_\_\_\_  
(joint owner, if any)

**[STREET ADDRESS]**

**[CITY, STATE, ZIP CODE]**

Signature(s) guaranteed:  
\_\_\_\_\_

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