

How to Set Up Stock Donation to CISC

Updated: Nov 2025

Thank you for considering a gift of stock to the Chinese Information and Service Center (CISC)! Donating appreciated securities is a tax-smart way to support our mission while potentially reducing your capital gains tax.

Benefits

- Avoid capital gains tax on appreciated securities
- Receive a charitable deduction for the fair market value of the stock (if you itemize)
- Support CISC's mission while maximizing tax efficiency

For official guidance on eligibility, documentation, and deduction limits, please visit the [IRS Charitable Contributions page](#). **We recommend consulting a tax professional for personal advice.**

Steps to Donate Stock

1. Contact your broker to initiate a stock transfer to CISC's brokerage account

Provide the following details to your broker:

- Charity Brokerage Firm: **Merrill Lynch**
- Account Name: **Chinese Information and Service Center**
- Account Number: **335-03613**
- DTC Number: **8862**

Please use DTC# 0671 if eTrade is submitting the gift as an ACAT (Automated Customer Account Transfer Service), a system developed by the National Securities Clearing Corporation (NSCC) that electronically transfers assets between brokerage firms.

- Contact Person: Iesha Edmond at iesha.edmond@ml.com

Specify the number of shares and whether this will be a one-time or recurring gift

2. Notify CISC

Email fundraising@cisc-seattle.org or call Frances Yuet at (206) 957-8542 with:
Your name, stock name, number of shares, and expected transfer date

3. Keep Records

Your broker will confirm the transfer
CISC will send you a written acknowledgment confirming the gift details

Thank you!

Your generous stock gift helps CISC continue empowering immigrants and families through early learning, community engagement, and cultural programs. We sincerely appreciate your support!

Chinese Information and Service Center (CISC)

A 501(c)(3) nonprofit organization registered in Washington State
611 S Lane St, Seattle, WA 98104
www.cisc-seattle.org

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