

Santa For A Day - Gifting Instructions

Gifts of Stock or Mutual Funds:

Gifts of publicly traded securities that have appreciated in value allow you to avoid capital gains taxes while also receiving a tax deduction for your gift. Santa For A Day benefits by selling the stock without paying taxes on the gain, and you benefit from making a contribution that would be larger than what you might have been able to donate in cash.

The following information can be used by advisers in facilitating gifts of stock or mutual funds to Santa For A Day:

DTC Number:	0141
DTC Participant Name:	Wells Fargo Clearing Services
Account Name/Number:	Santa For A Day Inc; 5950-2410
Broker Name:	Romano Wealth Management
Reference:	(Name of donor/purpose)

Gifts via Wire Transfer:

Bank Name:	Wells Fargo
Bank Address:	420 Montgomery St. San Francisco, CA 94104
ABA Routing:	121000248
Beneficiary Name:	Wells Fargo Clearing Services, LLC. One North Jefferson Ave St. Louis, MO 63103
Account Number:	4122023377
Further Credit To**:	"Santa For A Day, A/C 5950-2410"

***the Account number used is a Wells Fargo House account number; the 'Further Credit To' verbiage must be entered as text communication in the bank-to-bank instructions section.*

Before a transfer of any gift is made, we ask that you please notify Santa For A Day with the name of fund and number of shares gifted or approximate amount so we can monitor our account for the expected transfer and appropriately acknowledge your gift.

** Santa For A Day is a 501(c)(3) organization. Contributions are deductible as allowed by law. Please speak with your financial adviser about the deductibility of your gift.*