



PO Box 252  
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[traversetrails.org](http://traversetrails.org)

**Connecting  
Communities**

## Traverse Area Recreation and Transportation (TART) Trails, Inc.

### Asset Delivery Instructions for Gifts of Stock or Mutual Funds

Thank you for your support! We are pleased to provide you with the following asset delivery instructions. These instructions are to be used for gifts of stock or mutual funds. For your convenience, we have established an agency account with Charles Schwab.

For questions about any of these ways to give, please contact Casey Ressler, Development Director at [casey@traversetrails.org](mailto:casey@traversetrails.org), (O) 231.941.4300 or (C) 231.360.3604.

#### **Step 1: Notify TART Trails prior to transfer**

Please contact Casey Ressler, TART Trails Development Director, at 231-941-4300 or [casey@traversetrails.org](mailto:casey@traversetrails.org) to notify TART Trails of your gift. Stocks and mutual funds cannot be sold on our behalf without authorization from TART Trails. To ensure efficient administration of your gift, please contact our office first to initiate the transfer.

#### **Step 2: Send the information below to your broker**

Legal Name: Traverse Area Recreation and Transportation Trails, Inc.  
TART's tax ID # is 38-2847396

#### **DTC Eligible Securities**

DTC Clearing Agent Number: 0164 (code 40)  
Custodian Name and Number: Charles Schwab  
Further Credit to: TART Trails, Inc.  
Account Number at Custodian: 8406-6543

Contact: Dan McNamara  
Charles Schwab, Traverse City-Independent Branch  
215 Washington St, Suite 1B  
Traverse City, MI 49684  
231-421-6717

Once the trade is confirmed, TART Trails will send a thank you letter with the final donation amount. A trade confirmation summary report is also available upon request.

Please contact us if you have any questions and thank you for your generous support of TART Trails!