



BRIGHT HORIZON ACADEMY

---

## Stock Donations

### Maximum Benefit To Donors

#### E\*TRADE Information

URL: <https://us.etrade.com/e/t/plan/charitabledonations>

Account Name / Charity Name: **Islamic School of San Diego**

Receiving Firm Name: **ETRADE Securities**

Account Number: **5073-6104**

DTC/Clearing Number: **0385**

For donation confirmation and tax receipt please contact

**BHA BOE**

Email: [issd-boe@googlegroups.com](mailto:issd-boe@googlegroups.com)

---

**Islamic School of San Diego/Bright Horizon Academy**

Clairemont Campus: 7050 Eckstrom Ave., San Diego, CA, 92111. (T): 858-278-7970

Allied Garden Campus: 7202 Princess View Dr, San Diego, CA 92120. (T): 858-250-0972



**Step 1**

Go to  
**Transfers -> Other  
Services -> Make a  
charitable donation**

Complete View   Portfolios   Watch Lists   Orders   Balances   Transactions   Banking   **Transfers**   Tax Center   Documents   Dividend R

## Transfers

Transfer   Activity   External accounts   **Other services**



Request an IRA distribution



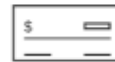
Pay a bill



Make a charitable donation



Deposit checks



Request a check



Order a check book



Request a debit card



Request a stop payment



Set up a direct deposit



Set up Automatic Investing



Transfer investments within E\*TRADE

**Islamic School of San Diego/Bright Horizon Academy**

Clairemont Campus: 7050 Eckstrom Ave., San Diego, CA, 92111. (T): 858-278-7970

Allied Garden Campus: 7202 Princess View Dr, San Diego, CA 92120. (T): 858-250-0972



## Step 2

At the bottom of the screen, select **Use Paper Form Instead**

June 22, 2021 12:09 AM ET

### Do well by doing good

Donating shares to charity can help make the world a better place, and you may qualify for tax deductions along the way.

Donate

[Donate from a retirement account](#)

#### Why donate shares?

##### Qualify for a tax deduction

Charitable donations may be tax deductible if you meet certain requirements. ⓘ

##### Avoid capital gains taxes

You're not required to pay capital gains taxes on donated shares.

##### Maximize your donation

Because you don't pay capital gains taxes, donating shares can help your money go further.

#### How to donate

Donating online is quick and easy.

1

Select the account from which you want to donate shares

2

Choose a charity with a mission you're passionate about

3

Select which shares you'd like to donate. We'll handle the rest!

Get started

[Use paper form instead](#)

### Islamic School of San Diego/Bright Horizon Academy

Clairemont Campus: 7050 Eckstrom Ave., San Diego, CA, 92111. (T): 858-278-7970

Allied Garden Campus: 7202 Princess View Dr, San Diego, CA 92120. (T): 858-250-0972



**Step 3**

You may either print the form and submit it or fill it online via DocuSign.

Click **Start**. Enter your information. Under **2. To Donate Cash/Stock to an organization with an existing E\*Trade Account**, Enter the following Information

Name of charitable institution:  
**Islamic School of San Diego**

Receiving Account Number: **5073-6104**

START

DocuSign Envelope ID: 07A09296-2B02-467D-A2E1-3B0B8000B0C0



E\*TRADE Securities LLC  
P.O. Box 484  
Jersey City, NJ 07303-0484

General Fax Number: 1-866-650-0003  
From Outside the US: +1 678 624 6950

Include a [Fax Cover Sheet](#) when submitting documents by facsimile.

Your E\*TRADE Securities Account Number

**CHARITABLE DONATION FORM**

- Use this form to request a charitable donation from your individual, joint, trust, business stock plan, or IRA account.
- To make a charitable donation from your **retirement account** online, [click here](#). If you prefer to submit our request via paper, please attach an [IRA Distribution Form](#).
- To make a charitable donation from your **stock plan account** online, [click here](#).
- Please note that if the purchase date and purchase price are not completed on the form, the shares donated will be selected on a FIFO basis (first-in, first-out). If the purchase price or purchase date is not completed on the form, we will process your request on a best efforts basis. We will contact you if the purchase price is incorrect for the purchase date provided on the form before processing your request.
- You can upload this form online via [documentupload.etrade.com](#)
- Need Help? Send us a secure message through [etrade.com](#) or call 800-ETRADE-1.

**1. ACCOUNT HOLDER INFORMATION**

PRIMARY ACCOUNT HOLDER	CO-ACCOUNT HOLDER, IF APPLICABLE
Name/Account Title	Name/Account Title
<input type="text"/>	<input type="text"/>

**2. TO DONATE CASH/STOCK TO AN ORGANIZATION WITH AN EXISTING E\*TRADE ACCOUNT**  
(COMPLETE THIS SECTION THEN PROCEED TO PAGE 2)

Name of Charitable Institution	Receiving Account Number
Islamic School of San Diego	50736104
Cash Amount to be Transferred	

**3. TO SEND A STOCK CERTIFICATE TO A CHARITABLE ORGANIZATION**  
(COMPLETE THIS SECTION THEN PROCEED TO PAGE 2)

Register in the Name of	Tax ID Number of the Receiving Party (required)
<input type="text"/>	<input type="text"/>
Ship to	Address
<input type="text"/>	<input type="text"/>

Note: Due to SEC regulation, all paper certificate requests will be electronically transferred to the security's transfer agent via the Direct Registration System (DRS) in place of sending a paper certificate. You should contact the security's transfer agent in order to ensure your gift is forwarded to the charitable organization. To view additional information, visit [www.etrade.com/drs](#).

**Islamic School of San Diego/Bright Horizon Academy**

Clairemont Campus: 7050 Eckstrom Ave., San Diego, CA, 92111. (T): 858-278-7970

Allied Garden Campus: 7202 Princess View Dr, San Diego, CA 92120. (T): 858-250-0972



BRIGHT HORIZON ACADEMY

**Step 4**

Complete the rest of the information and Click on **Finish**.

Transfer All Exercised Shares?  Yes  No If No, provide lot details below and the total Exercised Shares to transfer:

Grant Date	Grant Number	Exercise Date
Symbol	Number of Shares	Estimated Cost Basis

6D. OTHER STOCK PLAN SHARES (OSPS)

Transfer All OSPS Shares  Yes  No If No, provide lot details below and the total OSPS Shares to transfer:

Symbol	Number of Shares	Acquisition Date	Estimated Cost Basis
Symbol	Number of Shares	Acquisition Date	Estimated Cost Basis

7. ACCOUNT HOLDER SIGNATURES

I authorize E\*TRADE Securities LLC to transfer the securities or cash as listed above. I understand that upon receiving this form, E\*TRADE Securities will cancel any open orders that will affect the transfer.

X  6/21/2021  
 Signature of Primary Account Holder Date (MM/DD/YY)

X   
 Signature of Co-Account Holder Date (MM/DD/YY)

Please print your name here

Please print your name here

The E\*TRADE Financial family of companies provides financial services including trading, investing and banking products and services to retail customers. Securities products and services are offered by E\*TRADE Securities LLC, Member FINRA/SIPC.

© 2020 E\*TRADE Financial, LLC, a business of Morgan Stanley. All rights reserved.

CD-3000

Page 2 of 2

3304757.1  
CHARITABLE DONATION FORM  
1020-CDF-B66630

charitable\_donation.pdf

2 of 2

**FINISH**

**Islamic School of San Diego/Bright Horizon Academy**

Clairemont Campus: 7050 Eckstrom Ave., San Diego, CA, 92111. (T): 858-278-7970

Allied Garden Campus: 7202 Princess View Dr, San Diego, CA 92120. (T): 858-250-0972



BRIGHT HORIZON ACADEMY

---

**Step 5**

Notify **Islamic School of San Diego** to track your donation.

Contact Info

**BHA BOE**

Email: [issd-boe@googlegroups.com](mailto:issd-boe@googlegroups.com)

---

**Islamic School of San Diego/Bright Horizon Academy**

Clairemont Campus: 7050 Eckstrom Ave., San Diego, CA, 92111. (T): 858-278-7970

Allied Garden Campus: 7202 Princess View Dr, San Diego, CA 92120. (T): 858-250-0972