



Silver Lining Missions

Non-Restricted Stock Donation and Stock Disposition Guideline

Introduction

Silver Lining Missions is a non-profit organization.

Therefore, any fundraising or offerings must be regulated and are not to be done for the purpose of making a profit. This document defines the guidelines and process for non-restrictive stock donation.

Guidelines for non-restrictive Stock Donation

1. Restrictive Stocks: SLM only accepts restricted stocks (RSU) that are fully vested and are ready to be traded in the stock market.
2. Taxation advice: SLM will not provide you with any tax advice on the deductibility of your non-restrictive stock gift. These rules can be complicated depending on when and how you acquired the stock. Please consult your tax or financial advisor on the rules governing deductibility of any charitable gift.
3. Timing for making a non-restricted stock donation: The donor is responsible for making his or her best judgment on when to donate the non-restricted or securities in order to save tax or to make maximum contribution to SLM. The SLM will sell the donated stocks the next trading day after they are received.

To make a non-restrictive stock donation

If you plan to donate your non-restricted stocks to SLM, simply take the following steps to complete the transaction:

Initiate Transfer:

1. For stock transfer/donations within Charles Schwab, please find “Charitable Donation Form”.

On the section 2 “To donate stock to an organization with an existing Charles Schwab account”, fill in SLM information such as:

- Receiving Institution Account Number: 5613-6563
- Account Title/Registration: Silver Lining Missions
- Contact Name at Charitable Organization: Laurent Mak
- Telephone number: 408-770-2018
- Name of Receiving Institution: Charles Schwab
- DTC Number: 0164

Silver Lining Missions: Tax ID # 38-3840331 * 501(c)(3) ID# 17053123326022

Address: 1754 Technology Drive, Ste 232, San Jose, CA 95110
Tel: 408-770-2018 | Website: www.SilverLiningMissions.org



2. For stock transfers/donations from other brokerage firms, please contact your brokerage firm and request a transfer to Charitable Organization:

Name of Receiving Institution: Charles Schwab
Account Title/Registration: Silver Lining Missions
Receiving Account number: 5613-6563
Receiving DTC number: 0164
SLM Mailing Address: 1754 Technology Drive, San Jose, CA 95110
SLM Contact Person: Laurent Mak
SLM Office Number: 408-770-2018

3. Securities held in physical form by you: To contact Charles Schwab office 800-435-4000 to arrange for the physical transfer of your securities. The procedure is similar to the two methods stated above, except may involve delivering or mailing the actual securities.

Notify SLM:

Immediately after the transfer, please email the following information to the SLM office at laurent@silverliningmissions.org or call our office at 408-770-2018.

Receive confirmation:

SLM is not an appraiser, and will not provide donors with a “value” of donated stocks or securities. Instead, SLM will provide a Stock/Security Gift Receipt that acknowledges the date of contribution, the donor’s name and address, the number of shares given, and the name of the company.

SLM will send you a receipt upon receiving the notice for completion of transaction from both you and Charles Schwab. It will take approximately one to two weeks before you will receive the receipt.