

Securities Transfers to Benefit Bridgercare

Thank you for transferring your securities to Bridgercare! We are so grateful for your commitment to reproductive healthcare and education for everyone across Southwest Montana.

Here are the instructions to successfully initiate a transfer:

1. Please complete [this online form](#) to notify Bridgercare of the incoming transfer. This provides us with key information regarding your intended gift. If you have a money manager, they might be the best person to fill out this form.
2. Send an email to your broker indicating that you wish to make a stock gift to Bridgercare. Please specify the name of the stock, the number of shares (or dollar amount), and gift designation. Some brokers may provide/require a specific form for a gift transfer. Please share a copy of your email or form with Bridgercare Development staff (contact info below). Without this information, there may be a delay in acknowledging you (our amazing donor!) and receiving your tax documentation.
3. You should instruct your broker to transfer the shares electronically via DTC (Depository Trust Company) using the below information. If you are transferring shares yourself, the below information should be sufficient to make gift via a transfer.

Bridgercare

c/o Charles Schwab

DTC Participant #: 0164

Bridgercare Account #: 8608-6149

Phone: 406-579-0334

Reference: *[insert donor name/purpose]*

Contact Information for Transfer/Gift Questions:

North Fork Financial (Bridgercare's Financial Broker):

Sarah Fitzgerald, Partner/Advisor – sarah@northforkfinancial.com; 406-579-0334

Bridgercare Development Staff:

Emily Allison, Development Director – eallison@bridgercare.org; 406-587-0681 x137

Nathan Stein, Associate Dev. Director – nstein@bridgercare.org; 406-587-0681 x135