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Donor-Advised Funds (DAFs)

There's lots to love about using DAFs to support Rehema Home!



How to Donate Appreciated Stock

Many of our donors find drawing funds from appreciated stock an easy and tax-efficient way to invest in Rehema Home. If you would like to donate appreciated stock through a DAF, Fidelity Charitable is one popular option. The instructions below explain the Fidelity Charitable process; if you already have a donor-advised fund through another provider, you can generally recommend a grant to Rehema Home directly from that account.



Step 1: Open a Fidelity Charitable Giving Account (if you don't already have one)

The process only takes a few minutes. Once open, you'll receive a Giving Account number, which you'll need for a stock transfer.



Step 2: Initiate a Stock Transfer with your Brokerage

You can transfer stock to Fidelity Charitable directly from any brokerage (i.e. Schwab, Fidelity, Merrill, Vanguard, or another provider). Simply contact your brokerage and ask them to transfer shares via DTC using the stock delivery instructions below.

Deliver to: National Financial Services LLC

DTC #: 0226 Account #: Z97-000442

For benefit of: [Your Fidelity Giving Account Name & Number]

Important: Ask your brokerage to include your Giving Account number in the "for benefit of" line so Fidelity can properly credit your contribution.



Step 3: Recommend a Grant to Rehema Home

Once the stock arrives in your Giving Account, Fidelity Charitable will process it and you can recommend the funds as a grant to Rehema Home.

Legal Name: Rehema Home US Fundraising, Inc. EIN: 20-5768716

Searching by EIN is typically the fastest and most reliable way to locate us.



If Fidelity Charitable isn't your preferred giving platform, there are alternatives such as Schwab Charitable, Vanguard Charitable or your local community foundation's DAF. Any DAF typically allows you to contribute appreciated stock, receive an immediate tax receipt from them and recommend a grant to Rehema Home.

Important Note Please consult your tax advisor or financial professional regarding your specific circumstances, the benefits of donating appreciated securities and how this gift may fit into your overall charitable giving strategy.

Reach us with questions: info@rehemahome.org or 585.833.5748